

# HELP USER GUIDE

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# Video Signing

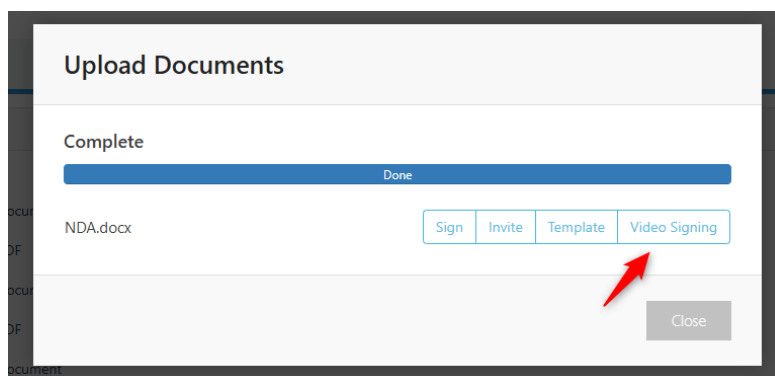
## Overview

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

Video Signing supports from 1 up to 50 participants, and supports the latest versions of the following browsers:

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

You can start setting up a document with Video Signing from the upload popup after uploading your document.



The person who sets up the video signing meeting can host the session themselves or invite someone else to host the video signing meeting. The host can be invited to sign the document or host the video signing meeting without signing themselves. You can also invite guests who don't need to sign, that support the signer in the video meeting.

Video Signing cannot be used with Video Confirmation, Face to Face Signing, or Review Before Signing.

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

Video Signing is an additional credit cost, on top of the documents and users in your plan.

Our Video Signing technology uses WebRTC and browser screen sharing. A desktop computer is the best platform for screen sharing; however, mobile devices use sync technology to share actions taken on the mobile device with other invitees.

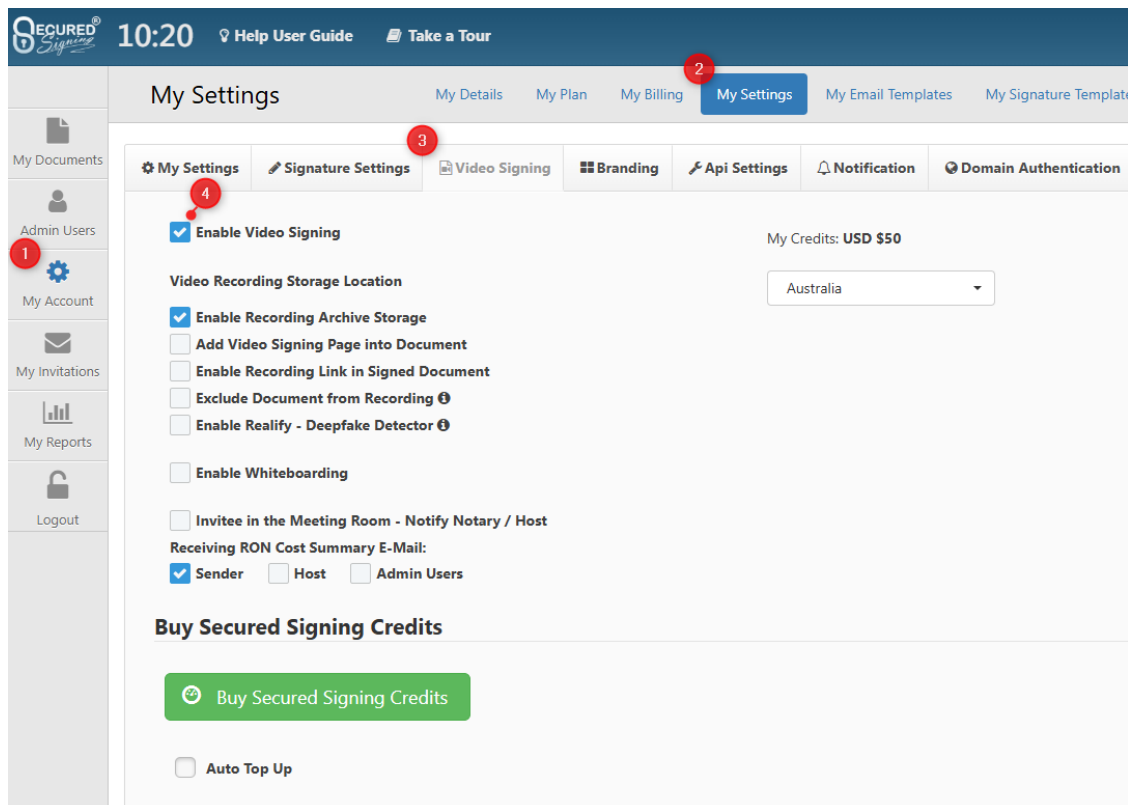
Please note:

- To host and manage a video signing meeting, the host must use a desktop or a laptop.
- For screen sharing, use a desktop or a laptop. On a mobile device, screen sync is used, allowing other participants to see the mobile device user's actions.

## Enable and Set Up Video Signing in Your Account

To enable Video Signing in your account, you must have a paid Secured Signing account. If you haven't bought any Secured Signing credits yet, you will receive \$5 in credits to try a video signing session at no cost to you.

To enable Video Signing, login to your Secured Signing account, then go to **My Account > My Settings > Video Signing**, then click the 'Enable Video Signing' checkbox.



Additional options for Video Signing include the following:

- **Video Recording Storage Location** – select your preferred region to store video signing session recordings for long-term archiving. You can select from the US, Australia, or the UK.
- **Enable Recording Archive Storage** – enabling recording archive storage allows you to access your video signing meeting recordings indefinitely. If this option is disabled, video signing meeting recordings are removed after 7 days. Storage has a monthly cost of \$5 that will be added to your plan (if you have a Notary Business Annual Plan, this is included).
- **Add Video Signing Page into Document** – adds a page to documents with Video Signing that shows the Video ID.
- **Enable Recording Link in Signed Document** – adds a link and code to access the video signing meeting recording after signing.
- **Exclude Document from Recording** – the recording will only show the invitees' web cameras, not the document(s) themselves.
- **Enable Realify - Deepfake Detector** – this feature checks if invitees are using Deepfake technology before and during the meeting. Each check costs \$1.

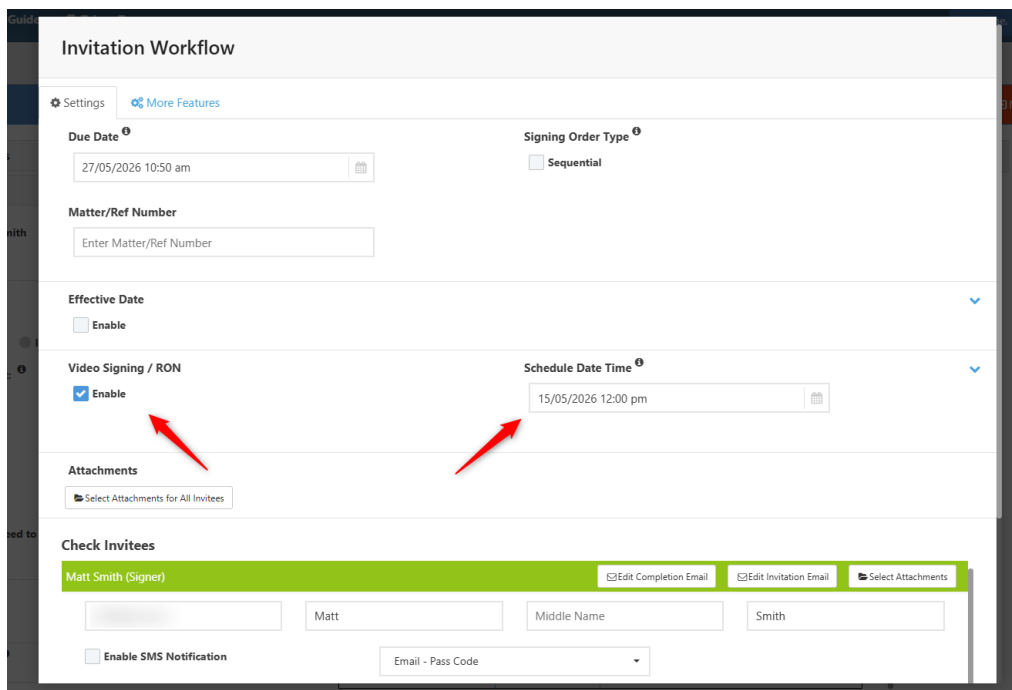
- **Enable Whiteboarding** – enables Whiteboarding during a video signing meeting, allowing the host to draw/type on top of the document (any drawings done in Whiteboarding are not saved to the signed document/s), or to upload a document after signing is complete and draw/type on it. The host will receive a copy of this Whiteboarding document, and enabling ‘Invitee Receives Whiteboard Document’ will send it to the invitees as well.
- **Invitee in the Meeting Room - Notify Notary / Host** – sends an email and/or SMS notification to the host of the video signing meeting if an invitee joins the meeting room and the host is not already there.
- **Receiving RON Cost Summary E-Mail** – select who receives a RON Cost Summary email after a video signing meeting. You can enable this for the Sender, the Host, and/or Admin Users in the account.
- **Buy Secured Signing Credits** – buy Secured Signing credits that are used for Video Signing costs.
- **Auto Top Up** – make sure you always have enough credits to use Video Signing by automatically adding the selected amount when your credits go below \$10.

## Sending a Document or Package in Video Signing

### Enable Video Signing in We Sign

In We Sign you can invite other people to sign documents online, and once Video Signing is enabled in your account, you can enable it for any We Sign process, including single documents and packages.

In the invitation workflow, check ‘Video Signing / RON’ and select a date and time to schedule the video signing meeting. An ICS file will be attached to the email invitation to add the meeting to Outlook or Google calendars.



The screenshot displays the 'Invitation Workflow' settings page. Key elements include:

- Due Date:** 27/05/2026 10:50 am
- Signing Order Type:** Sequential (unchecked)
- Matter/Ref Number:** Enter Matter/Ref Number
- Effective Date:** Enable (unchecked)
- Video Signing / RON:** Enable (checked) - A red arrow points to this checkbox.
- Schedule Date Time:** 15/05/2026 12:00 pm - A red arrow points to this field.
- Attachments:** Select Attachments for All Invitees
- Check Invitees:** Matt Smith (Signer) - Includes fields for Name, Middle Name, and Email - Pass Code.

The sender will automatically be selected as the video signing host, but you can also select another user to host the meeting.

**Check Invitees**

j13@dsx.co.nz    Matt    Middle Name    Smith

Email - Pass Code

Video Signing / RON

- Video Signing Host

Cancel    Send    Next

If multiple invitees need to sign the document, and they need to sign in a specific order, you can check 'Sequential' in the 'Signing Order Type' section and organise your invitees into the required order by dragging and dropping them in the 'Check Invitees' section.

**Invitation Workflow**

Settings    More Features

**Due Date**  
27/05/2026 11:15 am

**Matter/Ref Number**  
Enter Matter/Ref Number

**Effective Date**  
 Enable

**Video Signing / RON**  
 Enable

**Schedule Date Time**  
15/05/2026 12:00 pm

**Attachments**  
Select Attachments for All Invitees

**Signing Order Type**  
 Sequential

**Check Invitees**  
1. Matt Smith (Signer)    Edit Completion Email    Edit Invitation Email    Select Attachments

Enable SMS Notification

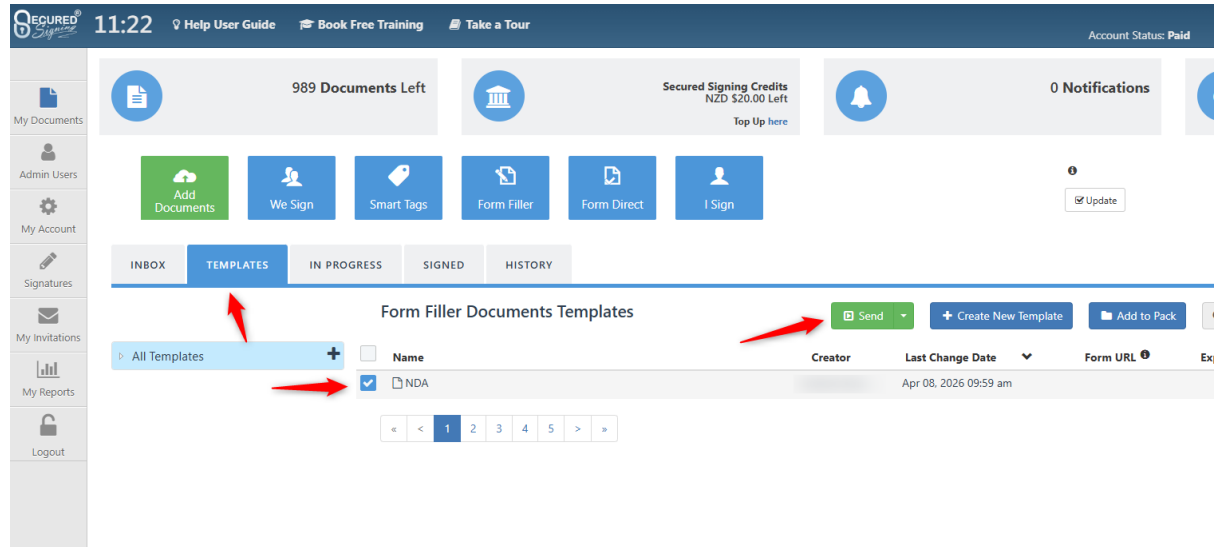
Matt    Middle Name    Smith

Email - Pass Code

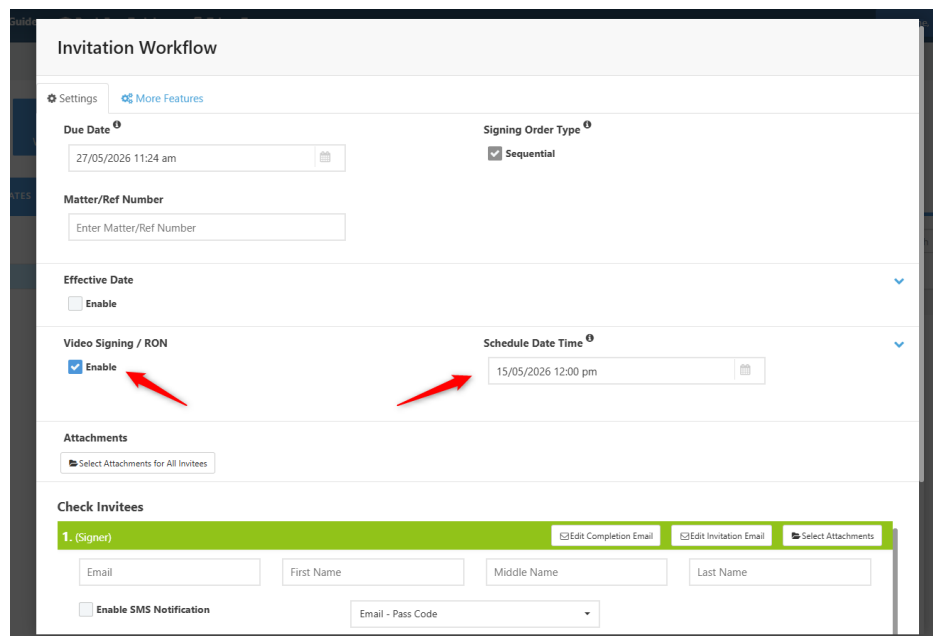
### Enable Video Signing when sending a Form Filler Template

With Form Filler you can setup reusable templates with fields and signatures, and once Video Signing is enabled in your account, you can enable it when sending out a Form Filler template or a template package.

Start by selecting the template(s) that you want to send out in the ‘Templates’ tab in ‘My Documents’, then click ‘Send’ to show the invitation workflow.



In the invitation workflow, check ‘Video Signing / RON’ and select a date and time to schedule the video signing meeting. An ICS file will be attached to the email invitation to add the meeting to Outlook or Google calendars.

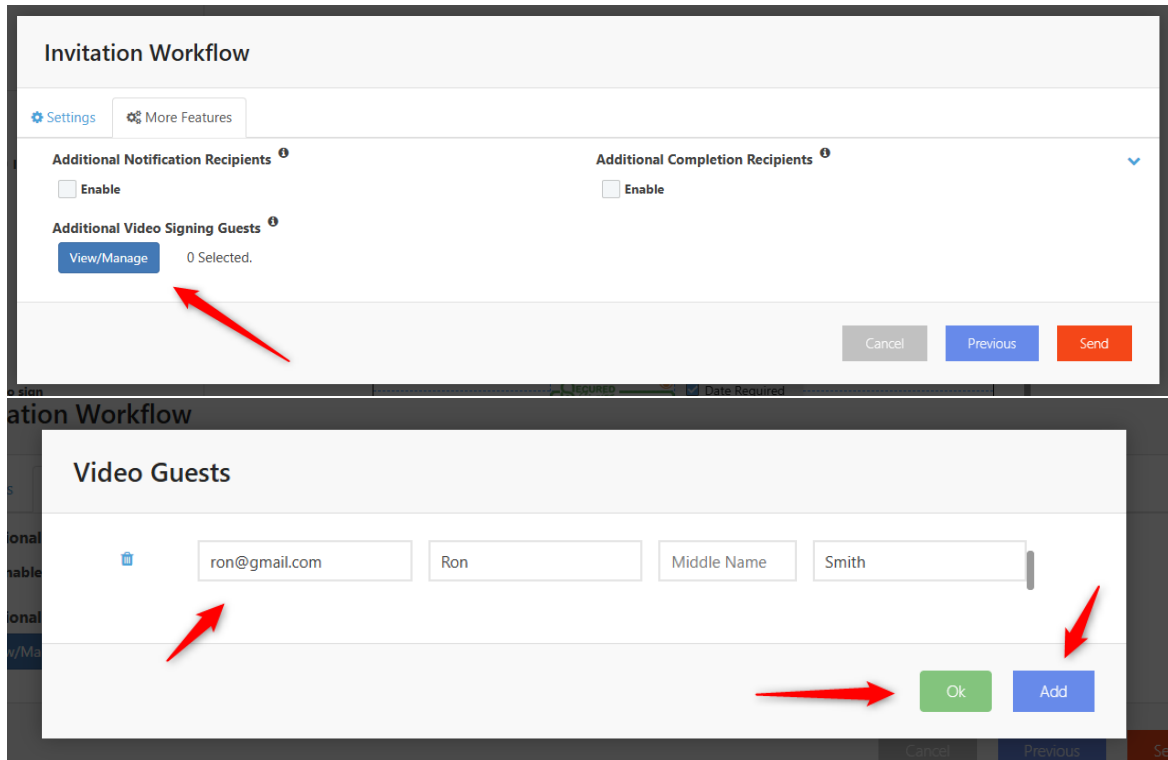


## Add Additional Video Signing Guests

You can add guests to a video signing meeting that don't need to sign. The sender can add as many guests as required when sending the document(s) out for signing.

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

You can add guests when sending out a document or a package in We Sign or using Form Filler templates if 'Video Signing / RON' is enabled in the invitation workflow.



The image shows two screenshots from the Secured Signing interface. The top screenshot is titled 'Invitation Workflow' and shows settings for 'Additional Video Signing Guests'. A red arrow points to the 'View/Manage' button. The bottom screenshot is titled 'Video Guests' and shows a form with input fields for email (ron@gmail.com), first name (Ron), middle name (Middle Name), and last name (Smith). Red arrows point to the 'Add' button and the 'Ok' button.

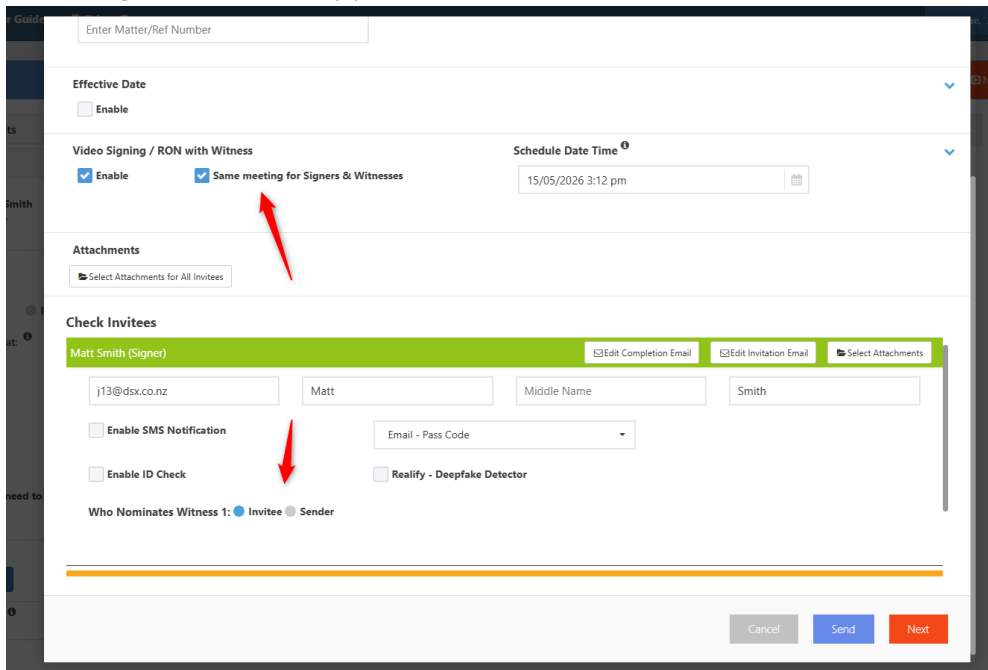
Each guest counts as an additional participant, which adds to the video signing cost. You can see pricing in the 'Video Signing Pricing Details' section in **My Account > My Settings > Video Signing**.

### Add Witnesses in Video Signing

Video Signing supports witnesses for invitees. The sender can add any number of witnesses for any invitees, and those witnesses can be either sender-nominated or invitee-nominated.

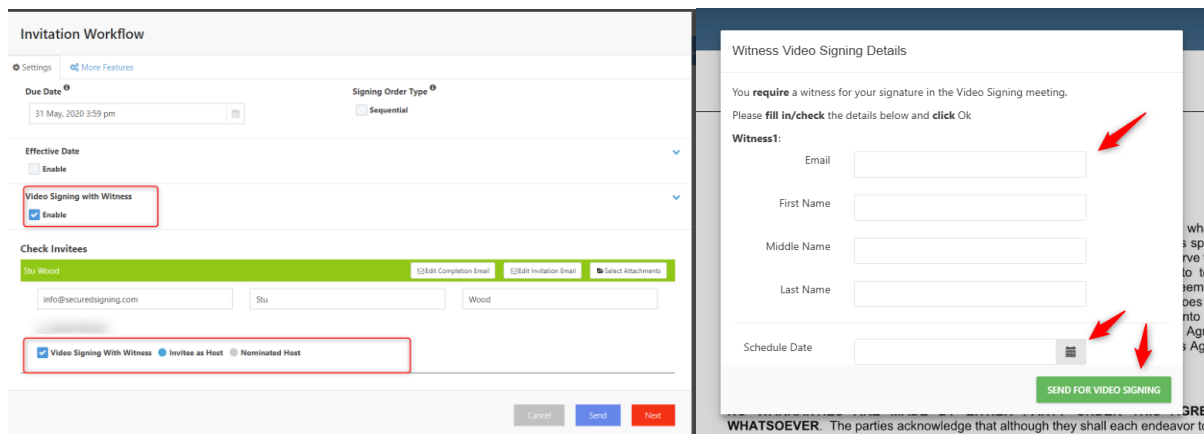
If ‘Same meeting for Signers & Witnesses’ is **enabled** in the invitation workflow:

- Either the sender will nominate the witnesses for the invitees, or the invitees will be asked to nominate their own witnesses upon joining the video signing meeting.
- The host, the invitees, and the witnesses will join the video signing meeting, where they can all sign the document(s).



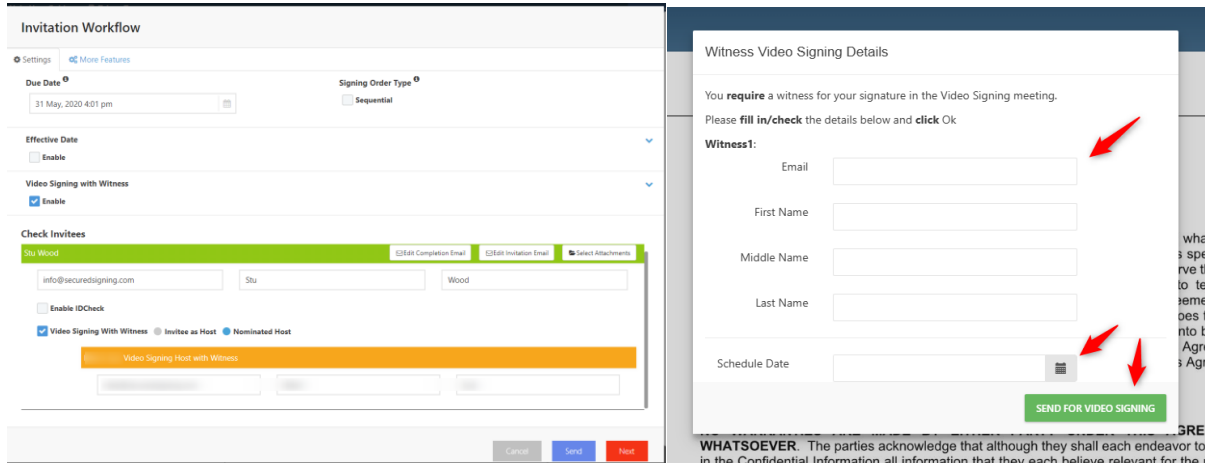
If ‘Same meeting for Signers & Witnesses’ is **disabled** in the invitation workflow, and **Invitee as Host** is selected:

- The invitee will host the video signing meeting.
- The invitee will first be asked to schedule a meeting and nominate a witness.
- The invitee and the witness will receive their invitation emails, and they can join the video signing meeting and sign the document(s).



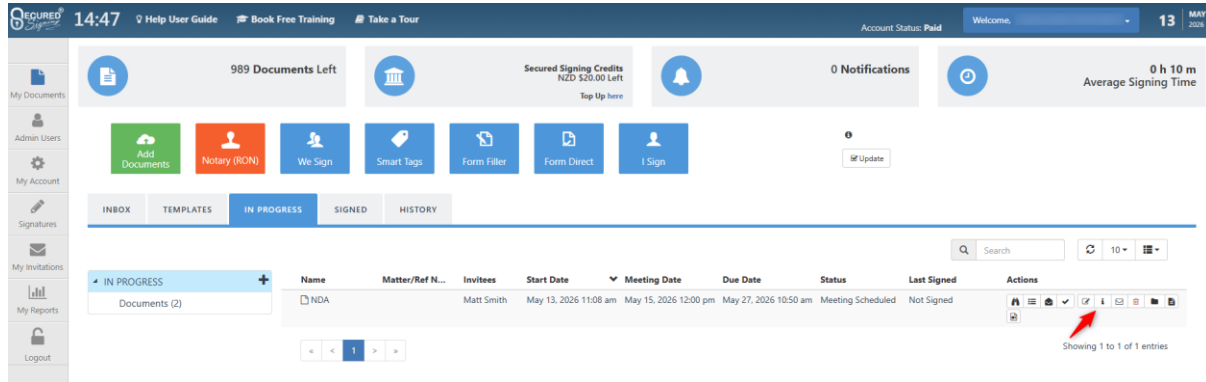
If ‘Same meeting for Signers & Witnesses’ is **disabled** in the invitation workflow, and **Nominated Host** is selected:

- The sender can nominate anyone to be the host.
- The invitee will first be asked to schedule a meeting and nominate a witness.
- Then host, the invitee, and the witness can join the video signing meeting, and the invitee and the witness can sign the document(s).

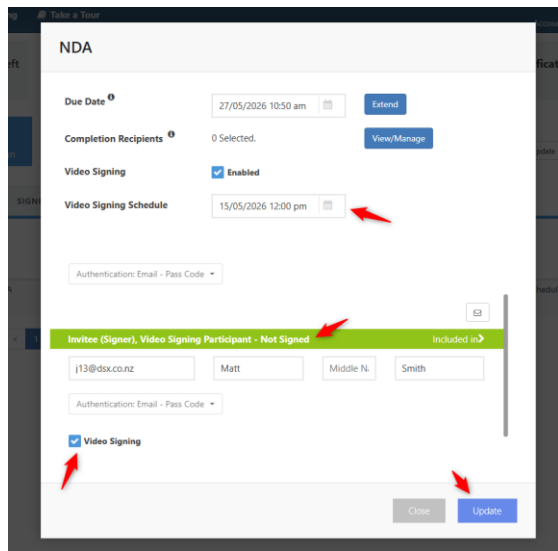


## Check and Update In Progress Video Signing Documents

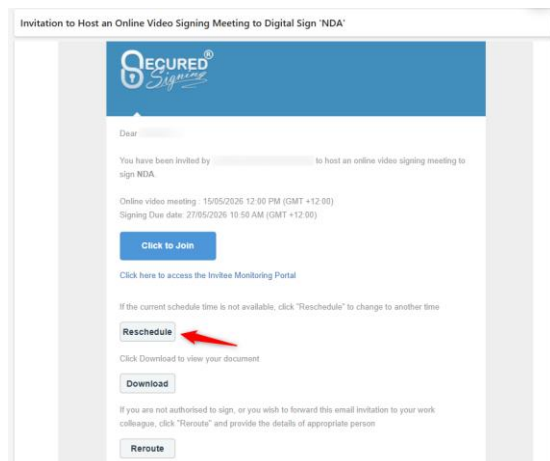
You can check the signing status of video signing documents at any time from the 'In Progress' tab in the 'My Documents' page. Click on the 'i' icon to check the signing progress or make changes.



Here you will see which invitees have signed the document(s), and you can reschedule the video signing meeting and/or disable 'Video Signing' for individual invitees. Make sure to click 'Update' after you have finished making any required changes.



You can also reschedule the video signing meeting from the invitation email by clicking 'Reschedule'.

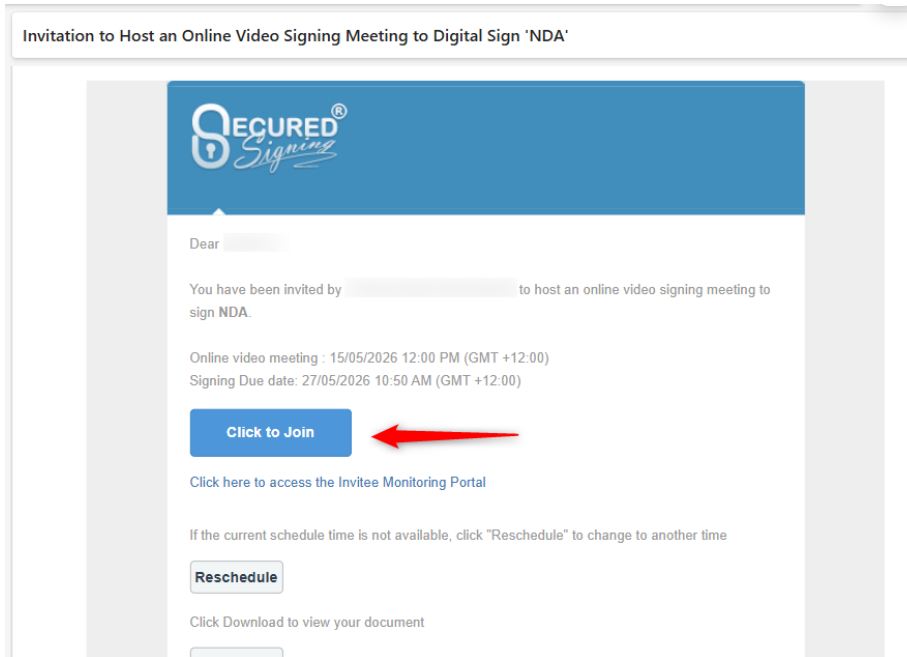


## Video Signing Meeting Process

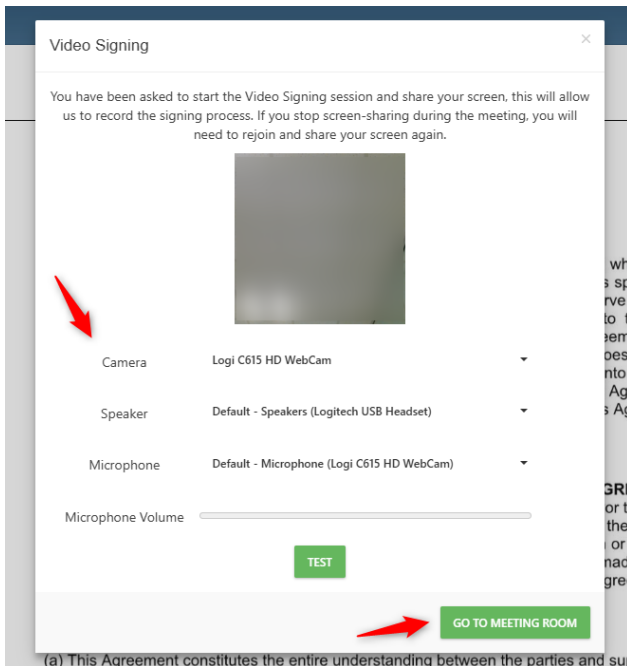
### Starting the Meeting

The video signing meeting is started by the host, and all participants must wait until the host starts the meeting before they can join.

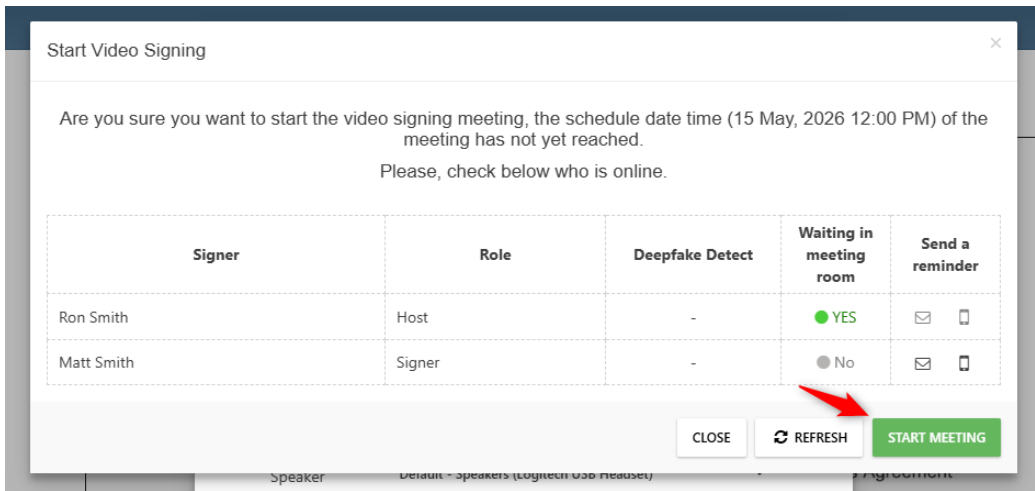
The host starts the meeting by first opening the link in their invitation email to host the video signing meeting.



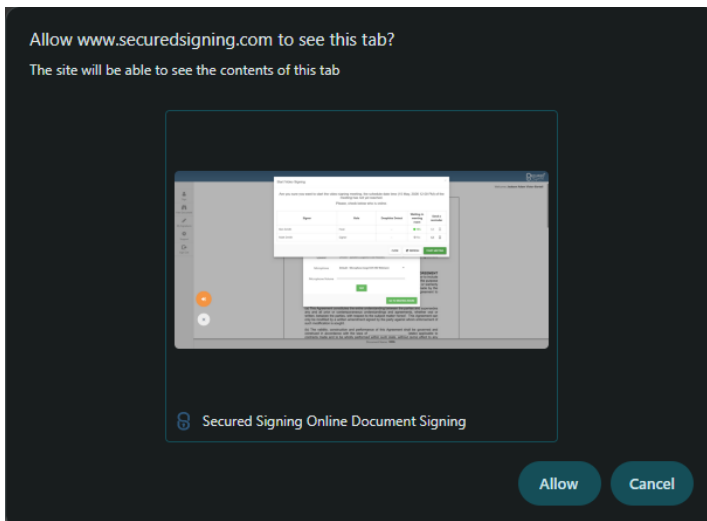
Then the host can select their webcam, speaker, and microphone, before clicking 'Go to Meeting Room'.



The host can see which invitees are waiting in the meeting room and can start the meeting by clicking ‘Start Meeting’.



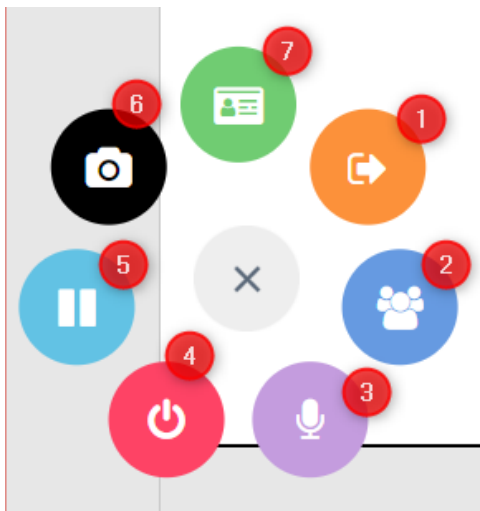
The host will be required to share their screen for the video signing meeting recording.



### In the Meeting

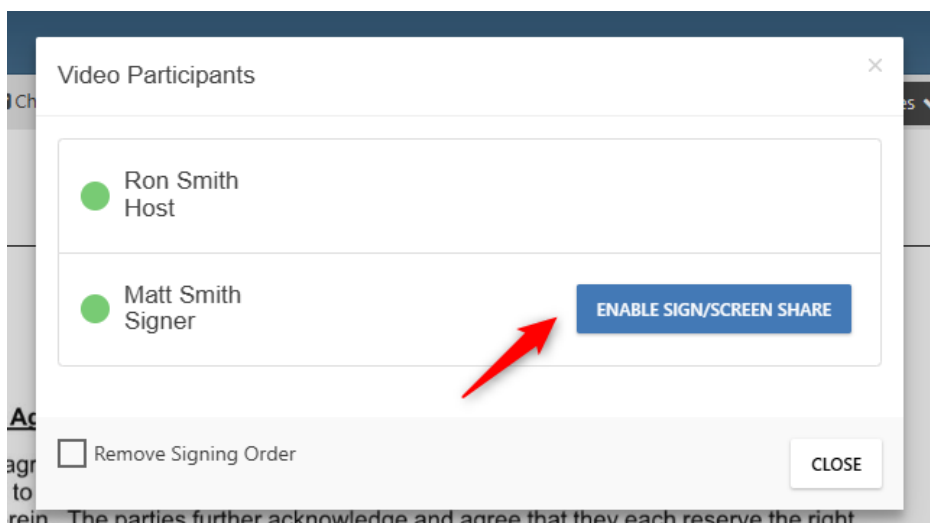
In the bottom left corner of the page, the host has the following buttons to control the video signing meeting:

1. Leave Meeting – clicking will leave the meeting. Please note that if the host leaves, the meeting will end after 5 minutes.
2. Start to Manage Signers – allows you to enable signing for the next invitee.
3. Mute – mutes/unmutes your microphone.
4. End Video Signing – allows you to end the video signing meeting and optionally reschedule it.
5. Pause Recording – pauses the video signing recording.
6. Snapshot – allows you to take a snapshot of an invitee’s webcam.
7. ID Visual Check – Check the invitees’ ID verification results (this button only displays if at least 1 invitee is using ID verification).



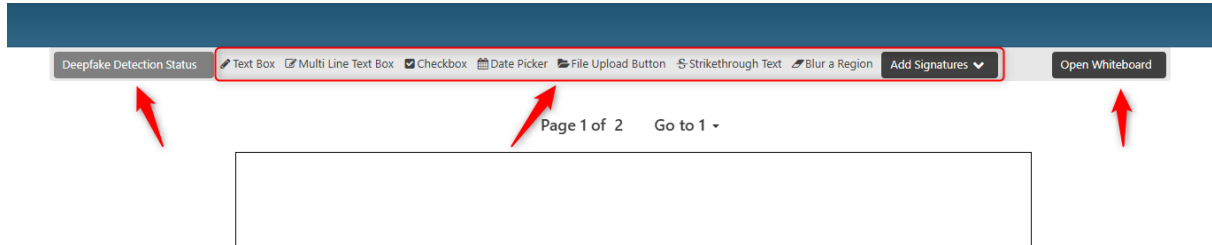
The ‘Start to Manage Signers’ button displays a pop-up where the host can manage who is currently sharing their screen and signing the document(s). The host can enable signing for the next invitee by clicking ‘Enable Sign/Screen Share’.

After the host clicks ‘Enable Sign/Screen Share’, the invitee will be prompted to share their screen, then sign the document.



As the host, you can add fields and additional signatures during a video signing meeting from the control bar near the top of the page.

Other controls include checking deepfake detection status if applicable and opening the Whiteboard if that setting is enabled in your video signing settings.

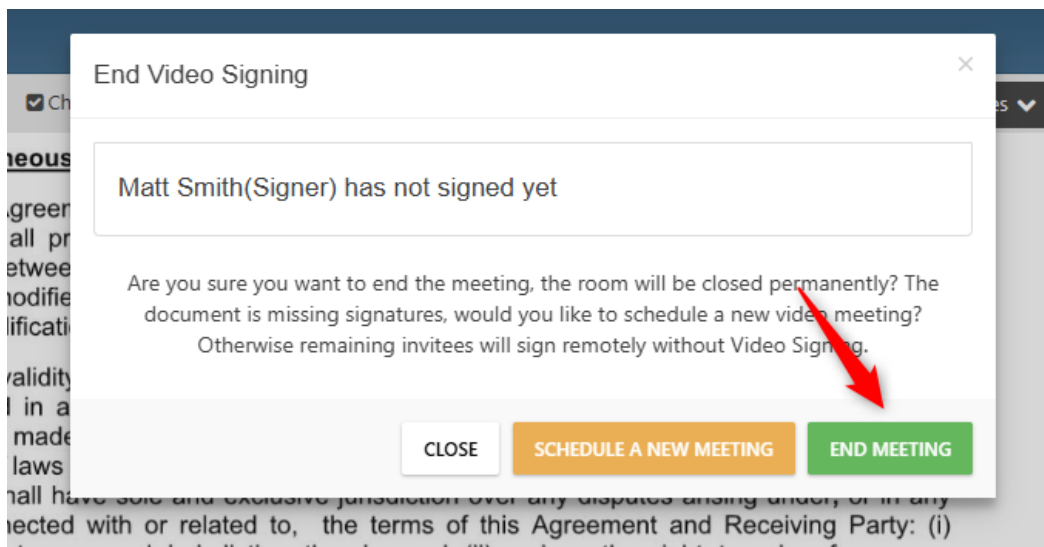


On the left side of the document, the host can see a tag labelled 'Sync All Here'. Clicking this button will make all invitees currently in the meeting scroll to that place in the document.



The host can end the video signing meeting at any time by clicking the 'End Video Signing' button. If all invitees have signed, the host can confirm they would like to end the meeting, then the meeting will end and all invitees will receive their completion email.

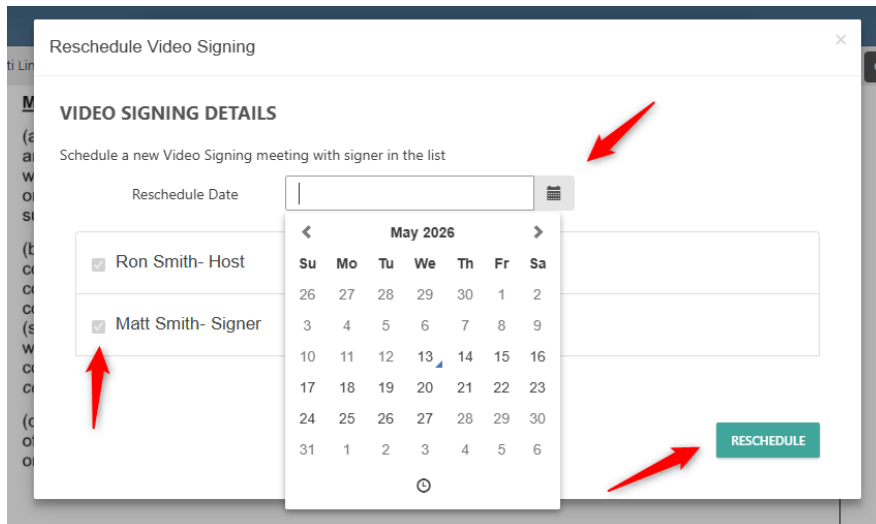
If there are still invitees that haven't signed, the host can choose to end the meeting by clicking 'End Meeting', and the invitees can sign the document outside of the video signing meeting.



The host can also choose to schedule a new meeting at a different date and time by clicking the ‘Schedule a New Meeting’ button.

Then, in the ‘Reschedule Video Signing’ pop-up, select the date and time for the new meeting, select which remaining invitees you would like to be invited to the new meeting, then click ‘Reschedule’.

New invitation emails will be sent out to participants for the new video signing meeting.



# Notary

## Overview

Using Secured Signing's Notary software, a Notary Public can notarize documents electronically.

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

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

By enabling Notary in Secured Signing you agree to the Notary Terms Of Use:

<https://www.securedsigning.com/notary-terms/>

## Notary Account Setup

### Enable and Setup Notary

Using Notary requires a paid account with the Notary Business Annual Plan. To enable and setup Notary in your account:

1. Go to **My Account > My Settings > Notary**
2. Tick 'Enable Notary'.
3. Tick 'Enable RON' and/or 'Enable IPEN'.
4. Upload your Notary Seal.
5. Optionally, tick 'Online Notary Act'. The text entered here will appear under your Notary Seal when you stamp a document.
6. Enter your commission ID.
7. Enter your commission expiry date.
8. Select your state.
9. Select your county.
10. Capture your Notary Signature.

Please note that other users in your account will have to enable and setup Notary individually to use it.

The screenshot shows the 'My Settings' page in the Secured Signing application. The 'Notary' tab is selected, and the 'Notary' sub-tab is active. The page contains several sections: 'My Settings' with checkboxes for 'Enable Notary', 'Enable RON', and 'Enable IPEN'; 'Buy Secured Signing Credits' with a 'Buy Secured Signing Credits' button and an 'Auto Topup' checkbox; and 'Notary Seal and Signature Settings' with a 'Switch to Notary Setup Wizard' button. The 'Notary Seal and Signature Settings' section includes an 'Upload Notary Seal' button, an 'Online Notary Act' checkbox, and fields for 'Commission ID', 'Commission Expiry Date', 'State', and 'County'. A 'Capture Notary Signature' button is located at the bottom of the settings section. Red numbered callouts (1-10) are overlaid on the page to highlight specific elements corresponding to the numbered steps in the list above.

Performing Remote Online Notarization (RON) sessions requires Secured Signing credits, which you can buy in the Notary settings page. We recommend ticking **Auto Topup**, which will automatically buy credits when you are running low.

The screenshot shows the 'Buy Secured Signing Credits' page. It features a prominent green button labeled 'Buy Secured Signing Credits' and an unchecked checkbox labeled 'Auto Topup'.

## Setup Video Signing for Remote Online Notarization (RON)

You can choose to enable the following video signing options for RON:

- **Video Recording Storage Location** – select your preferred region to store video signing session recordings for long-term archiving. You can select from the US, Australia, or the UK.
- **Enable Recording Archive Storage** – enabling recording archive storage allows you to access your video signing meeting recordings indefinitely. If this option is disabled, video signing meeting recordings are removed after 7 days. Storage has a monthly cost of \$5 that will be added to your plan (if you have a Notary Business Annual Plan, this is included).
- **Add Video Signing Page into Document** – adds a page to documents with Video Signing that shows the Video ID.
- **Enable Recording Link in Signed Document** – adds a link and code to access the video signing meeting recording after signing.
- **Exclude Document from Recording** – the recording will only show the invitees' web cameras, not the document(s) themselves.
- **Enable Realify - Deepfake Detector** – this feature checks if invitees are using Deepfake technology before and during the meeting. Each check costs \$1.
- **Enable Whiteboarding** – enables Whiteboarding during a video signing meeting, allowing the host to draw/type on top of the document (any drawings done in Whiteboarding are not saved to the signed document/s), or to upload a document after signing is complete and draw/type on it. The host will receive a copy of this Whiteboarding document, and enabling 'Invitee Receives Whiteboard Document' will send it to the invitees as well.
- **Invitee in the Meeting Room - Notify Notary / Host** – sends an email and/or SMS notification to the host of the video signing meeting if an invitee joins the meeting room and the host is not already there.

### Video Signing - Remote Online Notarization (RON)

Enable Video Signing

Video Recording Storage Location

US

Enable Recording Archive Storage

Add Video Signing Page into Document

Enable Recording Link in Signed Document

Exclude Document from Recording ⓘ

Enable Realify - Deepfake Detector ⓘ

Enable Whiteboarding

Invitee in the Meeting Room - Notify Notary / Host

## More Settings

The following additional settings are available for Remote Online Notarization.

- **Stamped document sent to invitee by** – if ‘Secured Signing’ is selected, the system will automatically send the signed document to clients on completion. If the ‘Notary Public’ option is chosen, the notary has full control of when the client will receive the signed document, and it can be held until payment by the client is completed.
- **Invitee/s receive Completion Certificate** – the invitee will receive a copy of the signing completion certificate
- **Invitee Authentication Type** – many US states require RON meetings to include Knowledge Based Authentication (KBA) and ID Verification for invitees before they can join. Tick KBA and ID Verification to include these in your process by default. SMS adds extra security by requiring an SMS code that will be sent to the clients’ mobile phones before they join the meeting.
- **ID Verification Settings** – additional settings for ID Verification:
  - **Number of Attempts** – select how many times the invitee can attempt and fail ID Verification before they are locked out of the meeting. We recommend allowing 2 attempts for each invitee, but please note that each attempt will use credits.
  - **Data Matching** – add extra security by requiring that specific details on the invitees ID matches data that you enter before sending the document, such as names, date of birth, and ID number and expiry date.
  - **If not Facial Match** – ID verification also checks that the invitees face matches the picture on the ID. Selecting ‘Continue’ here will allow the invitee to join the meeting if their face doesn’t match but selecting ‘Stop’ will cause them to fail ID Verification instead.
  - **Add a link to ID Verification in signed document** – this link will be added to the signed document and will lead to a page with the name of the invitee as it was on the ID, the type of ID used, the date of the ID Verification, and whether the invitee passed or failed.
- **Default RON workflow** – here you can tick ‘MISMO Compliance’ to have it be enabled by default for RON signing processes. MISMO requires that signers complete KBA and ID Verification immediately prior to joining the RON meeting and will make them restart if they close the browser session and open again.
- **Receiving RON Cost Summary E-Mail** – select which users receive the ‘RON Cost Summary’ email after a RON video signing meeting is completed.

Make sure to click the **Save More Settings** button after making any changes.

### More Settings

Stamped document sent to invitee by:  Notary Public  Secured Signing

Invitee/s receive Completion Certificate:

Invitee Authentication Type:  SMS  KBA  ID Verification

ID Verification Settings: Number of Attempts  One  Two Data Matching  If not Facial Match  Continue  Stop

Add link to ID Verification in signed document

Default RON workflow:  MISMO Compliance <sup>®</sup> This is often required for Mortgage, Real Estate, or Refinancing transactions, but not limited.

Receiving RON Cost Summary E-Mail:  Sender  Host  Notary  Admin Users

[Save More Settings](#)

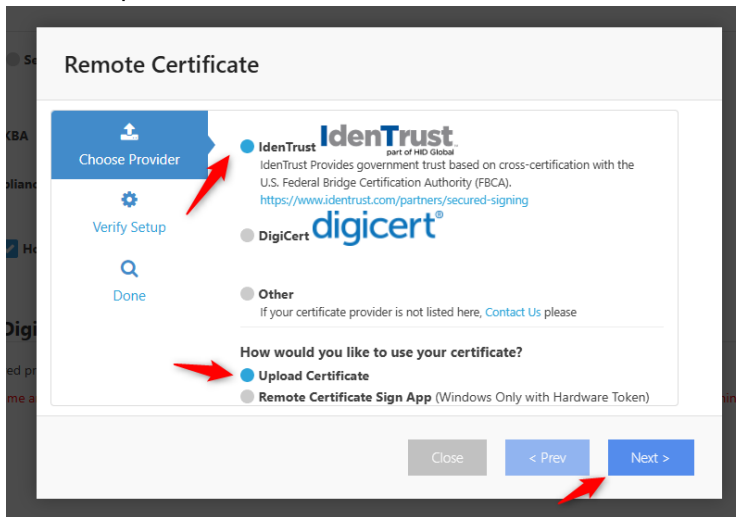
### Tamper-Proof Notary X509 Federal Bridge Digital Certificate

Secured Signing will allow you to use our X509 certificate if this is allowed in your state. If your state requires you to use an individually issued digital certification from an approved provider, you can purchase one from IdenTrust here: <https://www.identrust.com/certificates/enotary-programs>. Go to **Buy Now > Select Secured Signing > Next > IGC Notaries Basic Assurance, individual Identity, software storage > Next > Select number of years > Next > Buy Now >** follow promotes to complete.

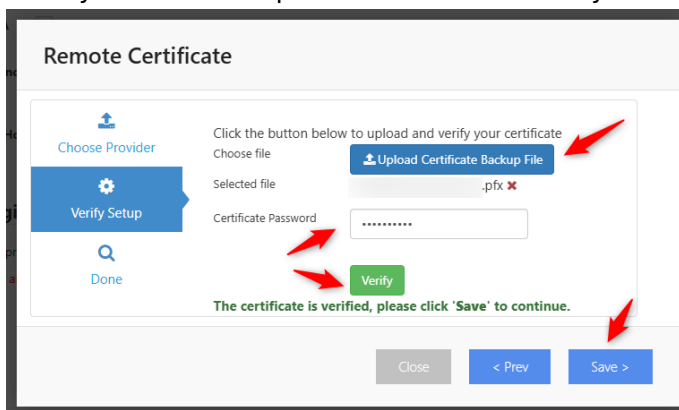
Once you have a digital certificate, click ‘Setup Certificate’ in Notary settings to start setting it up for your Secured Signing account. Please note that the name and email address on the certificate **MUST** match the name and email address you used to create your Secured Signing account. If these details do not match, please contact Secured Signing at [helpdesk@securedsigning.com](mailto:helpdesk@securedsigning.com)

To upload a certificate for use in Secured Signing:

1. Select your certificate provider (typically IdenTrust)
2. Select ‘Upload Certificate’ and click ‘Next’.



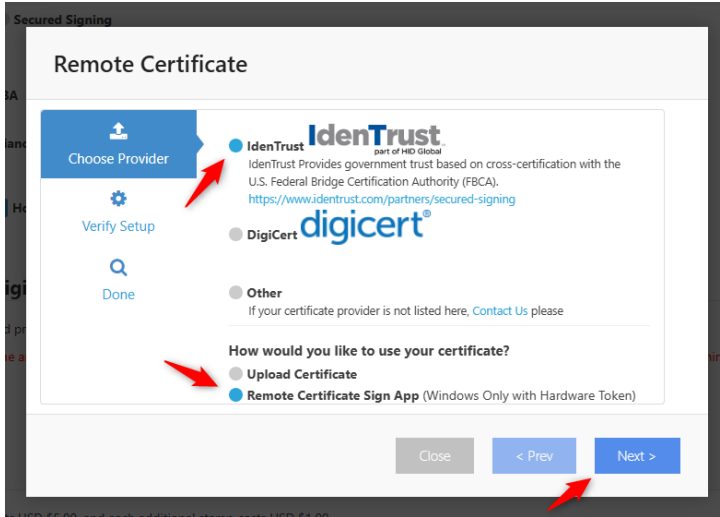
3. Click ‘Upload Certificate Backup File’, then browse to the location where you stored your signing certificate backup file and select it. Make sure that you select the signing certificate backup file and not the encryption certificate backup file.
4. Enter your certificate password and click ‘Verify’.



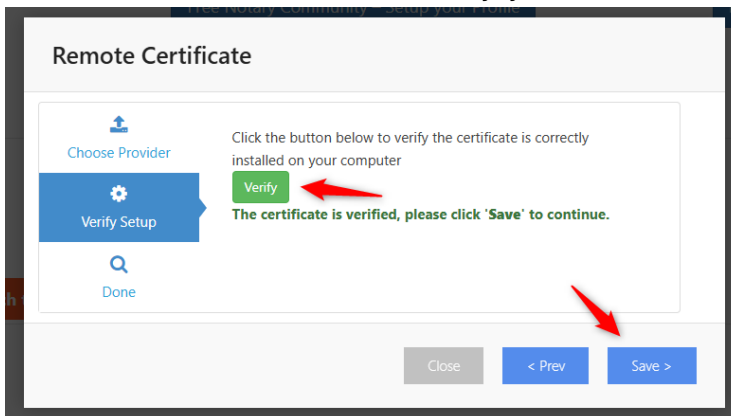
5. Finally, click ‘Save’.

In very few cases where you have a USB token/hardware to store your certificate, or you want to keep the certificate on your premises/Windows desktop, you can install the Remote Certificate Sign app to use the certificate. If that is your situation, please follow the below steps:

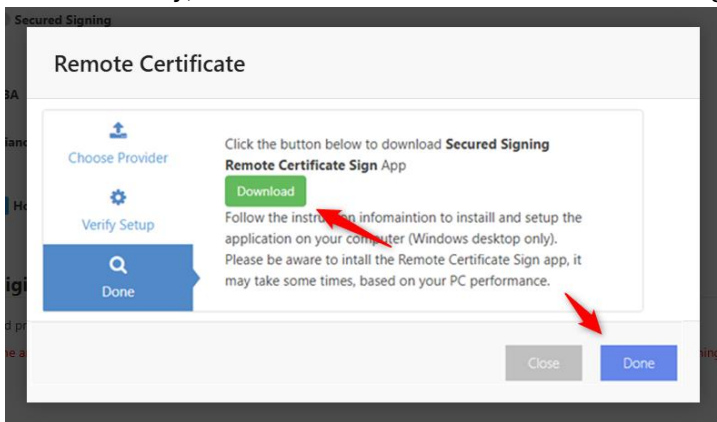
1. Select your certificate provider (typically IdenTrust)
2. Select 'Remote Certificate Sign App' and click 'Next'.



3. Click 'Verify'.
4. If the certificate is verified successfully, you can click 'Save' to continue.



5. Click the 'Download' button to download the Remote Certificate Sign app then click 'Done'. Finally, follow the install wizard to finish installing the app.



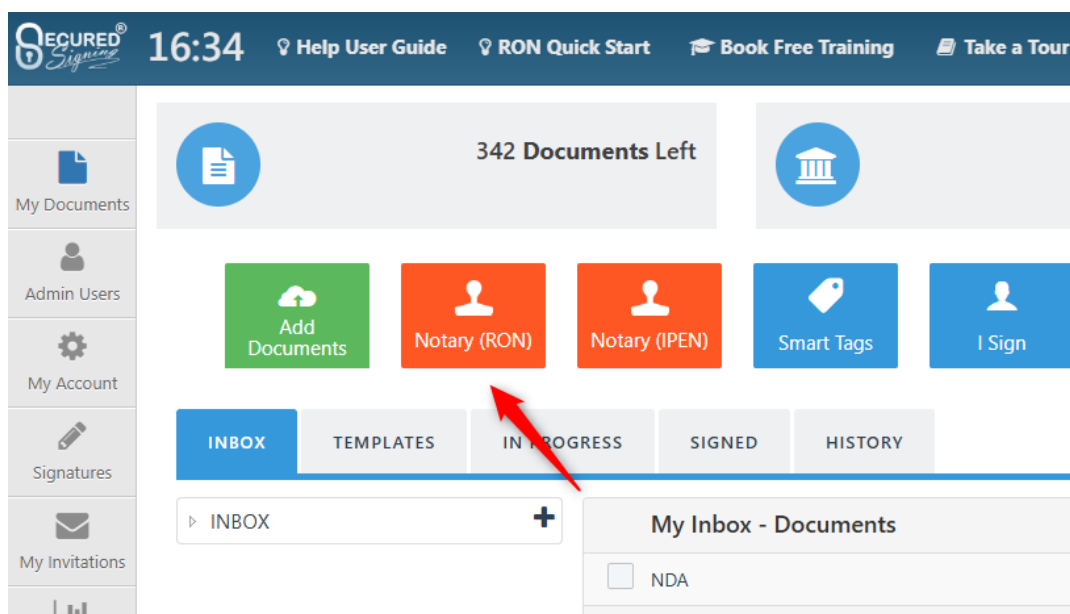
Now every time a Notary notarizes or signs a document, we will use this certificate to create an X509 Digital Signature tamper seal.

## Remote Online Notarization (RON) Process

### Preparing for a Remote Online Notarization

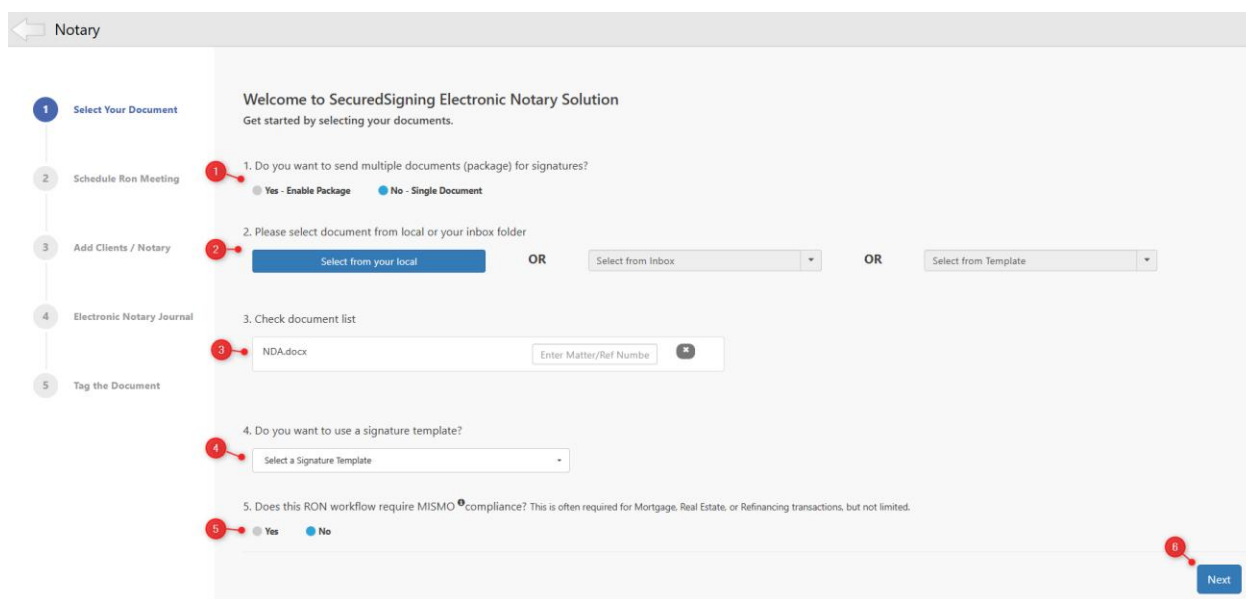
#### RON Wizard

To get started prepping your document(s) for notarization using the RON Wizard, go to 'My Documents' and click the 'Notary (RON)' button.



In the **Select Your Document** page:

1. You can send a single document or create a package of multiple documents.
2. Upload a document from your PC or a cloud storage provider, select a document from your Secured Signing inbox, or select a Form Filler template.
3. Check your document list.
4. Optionally, select a signature template.
5. Choose if you would like to require MISMO compliance for this notarization.
6. Finally, click 'Next' to continue to the next page.



In the **Schedule RON Meeting** page:

1. Choose to assign this notarization directly to a Notary or to a Notary Queue.
2. Choose the date and time for the RON meeting. You can reschedule this later if needed.
3. Select your ‘Identity Proofing and Credential Analysis’ method(s). The default options from your Notary settings will be selected automatically.
  - a. KBA – the invitee is asked a series of questions based around themselves to confirm their identity.
  - b. ID Verification – the invitee is required to scan and verify their ID or passport.
  - c. SMS – the invitee is sent an SMS message containing a code used to enter the meeting.
  - d. Personal Knowledge – tick when the Notary knows the invitee and can confirm their identity. Can’t be used with KBA or ID Verification.
  - e. Credible Witness – add a credible witness who can confirm the invitee’s identity. The credible witness will be required to complete KBA and ID Verification.
4. If you are a Notary in Florida you need to select whether you are supervising the witnessing of electronic records for certain types of documents. Selecting ‘Yes’ here means the invitee will be required to answer a set of questions after KBA is completed and based on their answers they will or will not be allowed to enter the meeting.
5. Finally, click ‘Next’ to continue to the next page.

In the **Add Clients / Notary** page:

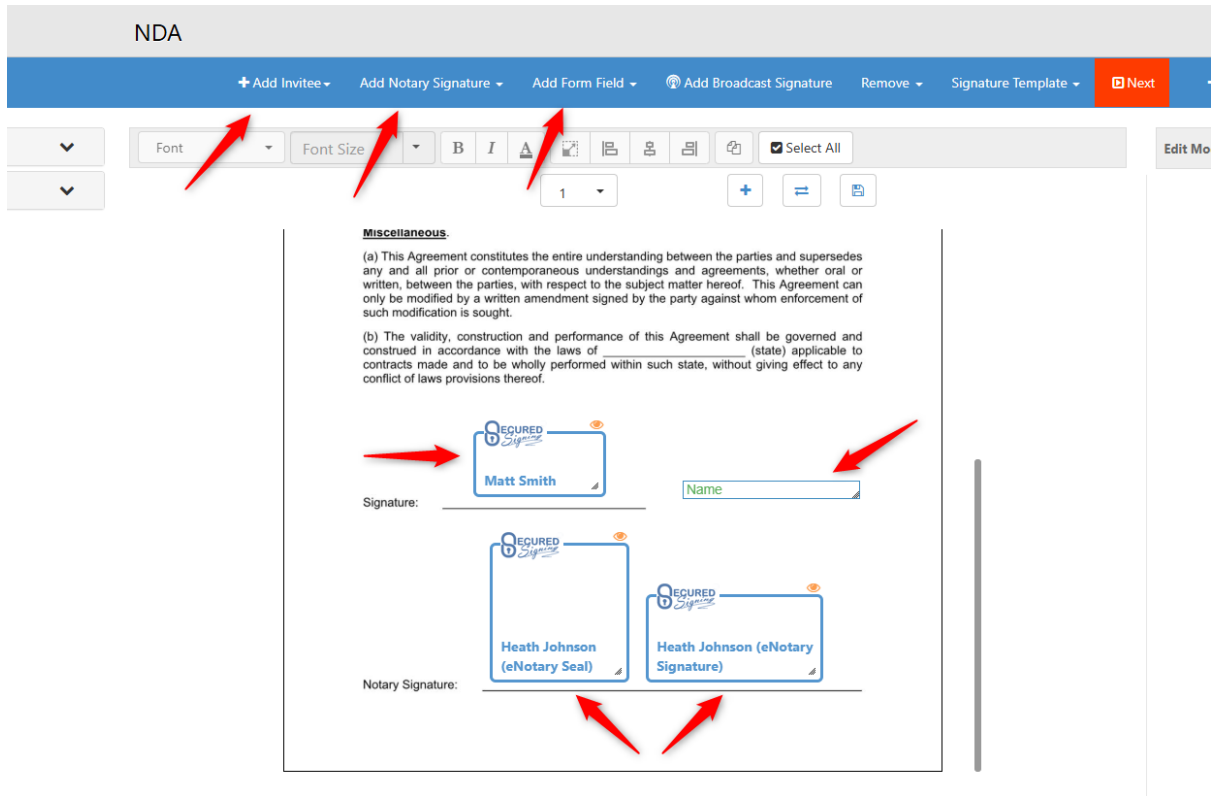
1. Add invitees, enter their email addresses and full names, and select a different authentication type if needed.
  - a. If it is enabled in your account settings, you can enable ‘Realify – Deepfake Detector’ for invitees here.
  - b. If it is enabled in your account settings, you can enable ‘SMS Notification’ for invitees here.
2. Select the notary that will notarize this RON session. By default the sender will be selected.
3. Select the venue where the notarization will take place. By default, the selected notary’s state and county will be selected.
4. Click ‘Next’ to continue to the next page.

In the **Electronic Notary Journal** page:

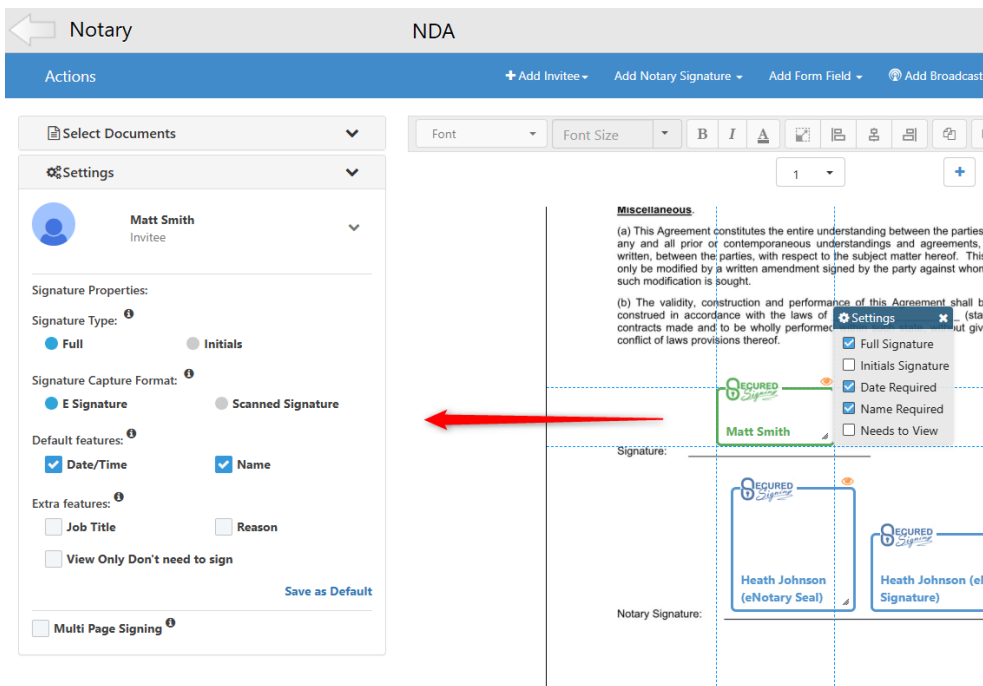
1. Optionally, disable the Electronic Notary Journal.
2. Edit the document title, select the type(s) of notarization, and enter the notary fee for each of the documents listed.
3. Enter the required details for each invitee under ‘Principal Details’.
4. Click the ‘Start Tagging’ button to start tagging the document.

### Tagging and Sending the Document

Before sending out the invitation for a RON meeting the document needs to be prepared by adding form fields, signatures for the invitee(s) and the notary, and notary stamps.



You can change settings for invitee signatures if needed, such as changing from a full signature to initials, and enabling extra features that will show additional details on the signed signatures such as job title and reason for signing.



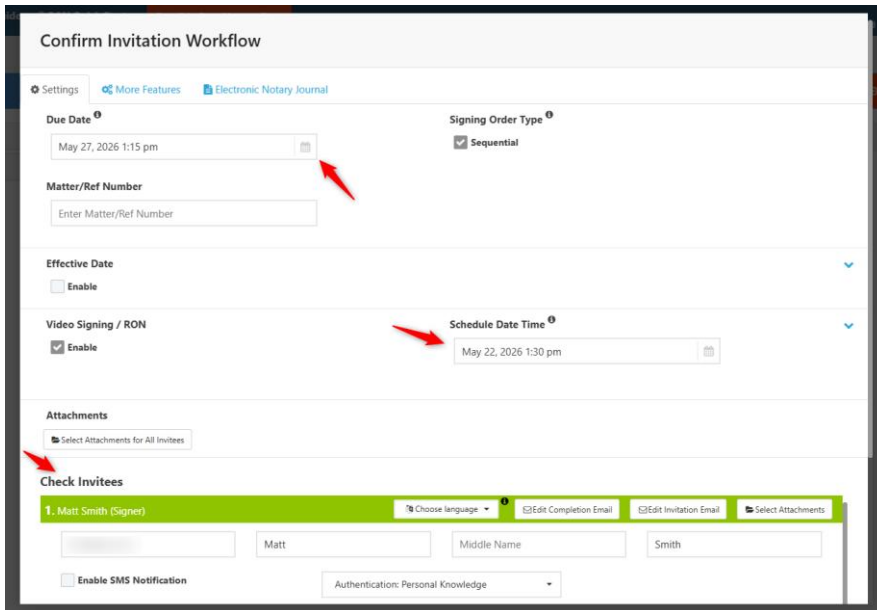
You can also change settings for form fields by selecting them, then changing the settings in the ‘Settings’ section on the left side of the page, or in the box that display next to the field if it is enabled in your account.

The screenshot shows the 'Notary NDA' document editor. On the left, the 'Settings' panel is expanded, showing options for 'Field Assigned to' (Matt Smith), 'Validation' (Mandatory/Read Only), 'Validation rule' (None), 'Field Length Limit' (Min/Max), 'Add a field label' (Name), and 'or Type your own' (Name). The main document area displays a 'Miscellaneous' section with legal text. A signature line is visible with a 'Settings' popup box over it, showing options for 'Field Label' (Name) and 'Assign to' (Matt Smith). A red arrow points to the 'Settings' panel, and another red arrow points to the 'Settings' popup box.

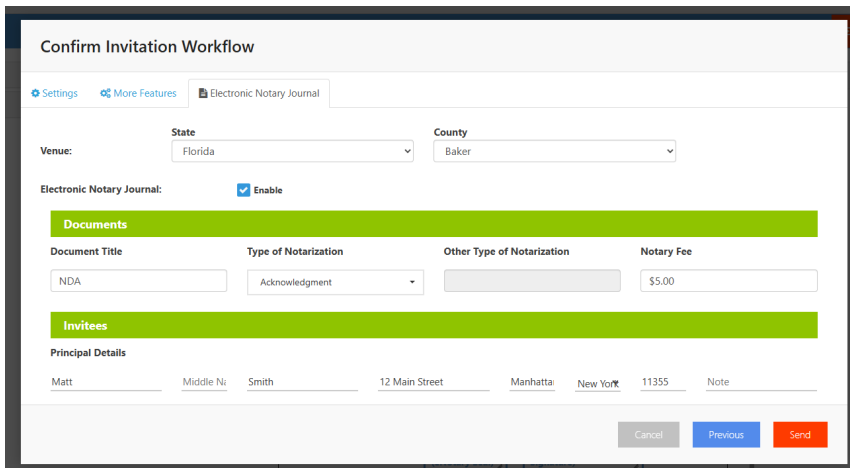
Once all signatures, stamps, and form fields have been added to the document. Click ‘Next’ to continue to the invitation workflow.

The screenshot shows the document editor interface with the 'Next' button highlighted in red. The document content is partially visible, showing legal text and a signature line. A red arrow points to the 'Next' button.

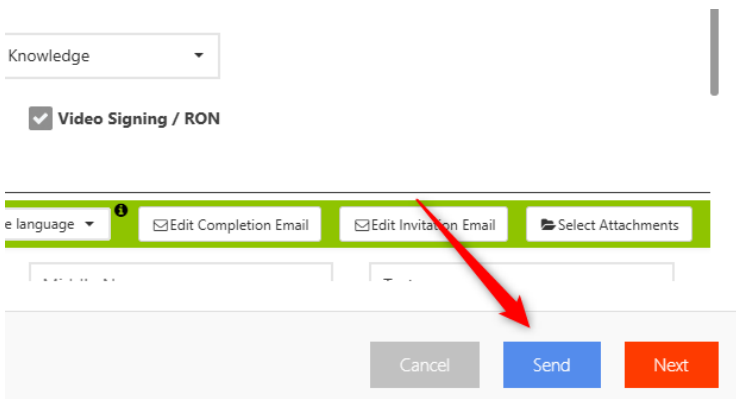
In the invitation workflow pop-up, you can change the scheduled meeting date and time if needed, change the due date, change invitee details and authentication, change the invitation/completion email templates, and enable extra features.



You can also make changes to the electronic notary journal if needed.



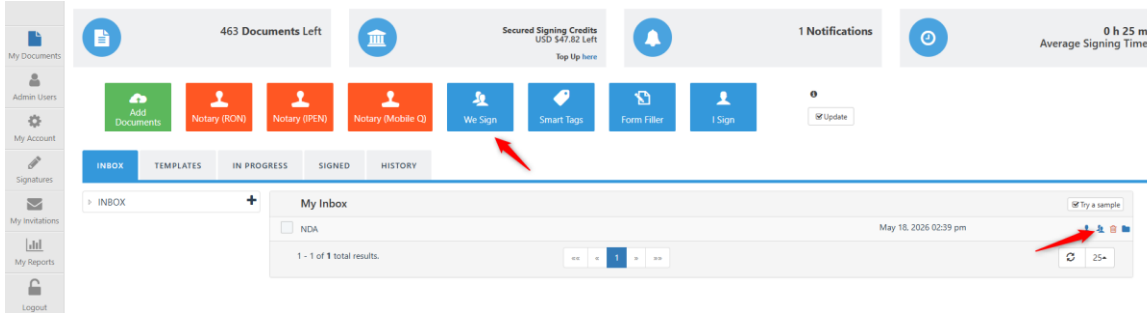
Finally, click **Send** to send the document(s) out for signing and notarization. The invitees, the notary, and the host (if different from the notary) will receive invitation emails.



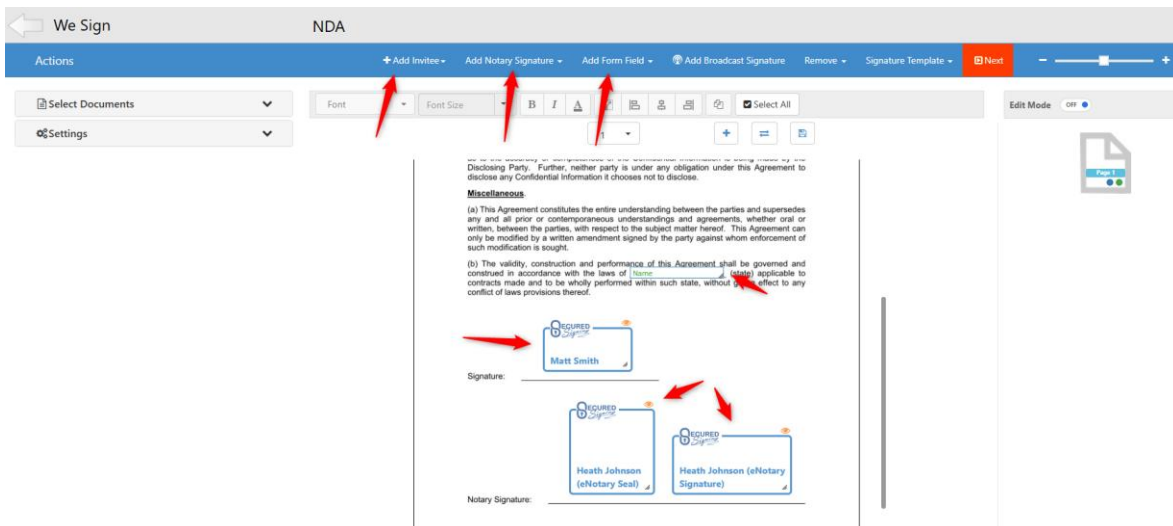
### Notary in We Sign

You can also start a notary process from the We Sign designer if you don't want to use the RON wizard.

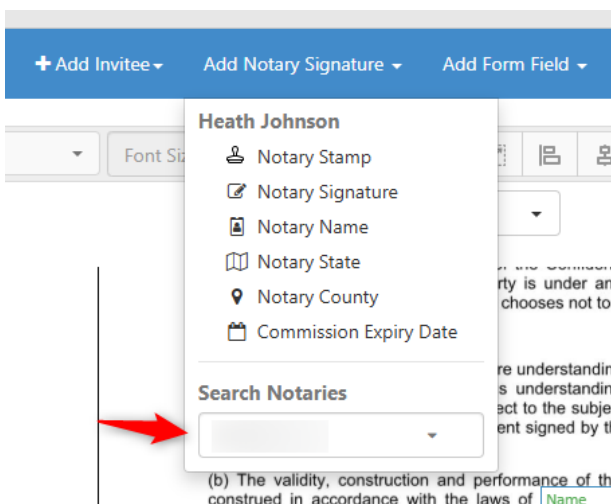
First go to **My Documents > Inbox** and either click **We Sign** and upload the document(s) you need to sign and notarize, or if you have already uploaded the document, find it in the inbox and click this icon to open it in the We Sign designer:



Then, in the We Sign designer, add form fields and invitees, and place your notary stamp and signature as needed.



If your account has multiple notary users, you will be able to select a which user will be the notary for this process in the 'Add Notary Signature' dropdown.



Click the **Next** button to continue to the invitation workflow, then enable **Video Signing / RON** and schedule a date and time for the meeting.

The screenshot shows the 'Invitation Workflow' form. The 'Video Signing / RON' section is highlighted with a green bar and has a red arrow pointing to the 'Enable' checkbox, which is checked. Another red arrow points to the 'Schedule Date Time' field, which is set to 'May 22, 2026 12:30 pm'. Other visible fields include 'Due Date' (May 27, 2026 12:14 pm), 'Signing Order Type' (Sequential), and 'Matter/Ref Number'.

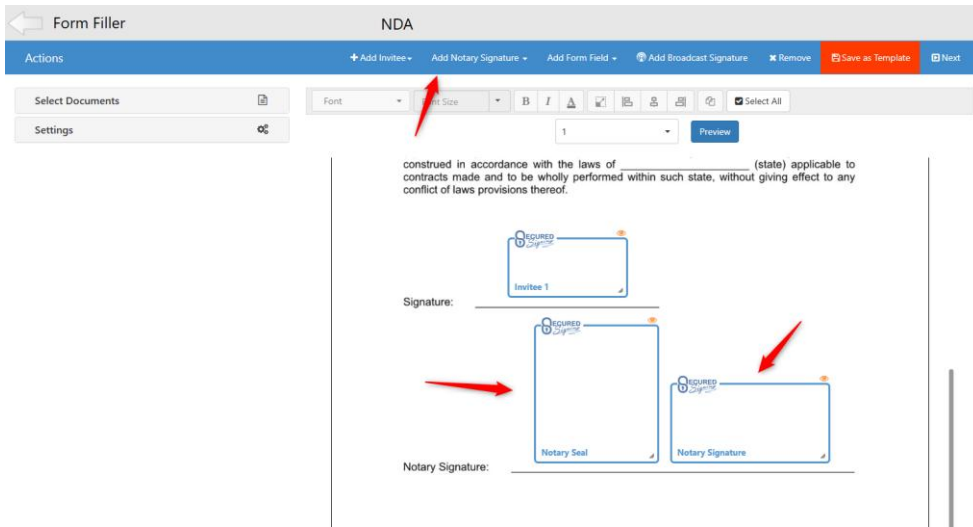
Go to the **Electronic Notary Journal** tab to select a state and county for the venue, choose if you'd like the electronic notary journal to be enabled for this RON process, and enter the required details if you do leave it enabled.

The screenshot shows the 'Invitation Workflow' form with the 'Electronic Notary Journal' tab selected. Red arrows point to the 'Electronic Notary Journal' tab, the 'State' dropdown (Florida), the 'County' dropdown (Baker), and the 'Enable' checkbox for the 'Electronic Notary Journal', which is checked. Below this is a table for 'Documents' with columns for 'Document Title', 'Type of Notarization', 'Other Type of Notarization', and 'Notary Fee'. The 'Document Title' is 'NDA' and the 'Notary Fee' is '\$5.00'. Below the table is the 'Invitees' section with 'Principal Details' for 'Matt Smith'.

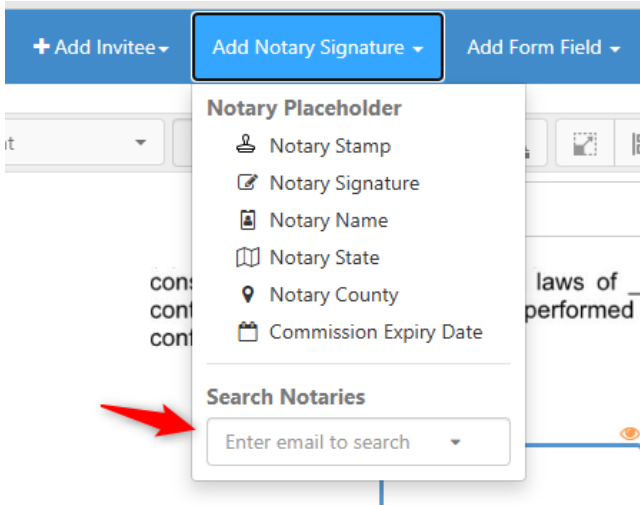
Change any other settings and enable/disable features in the invitation workflow as needed and finally click **Send** to send invitations to the RON meeting.

### Notary with a Form Filler Template

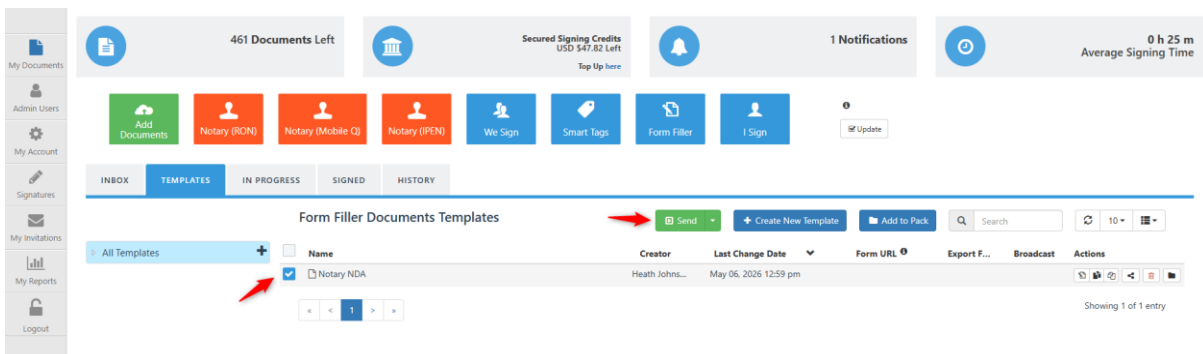
When designing a Form Filler template you can add a notary stamp and a notary signature to the template.



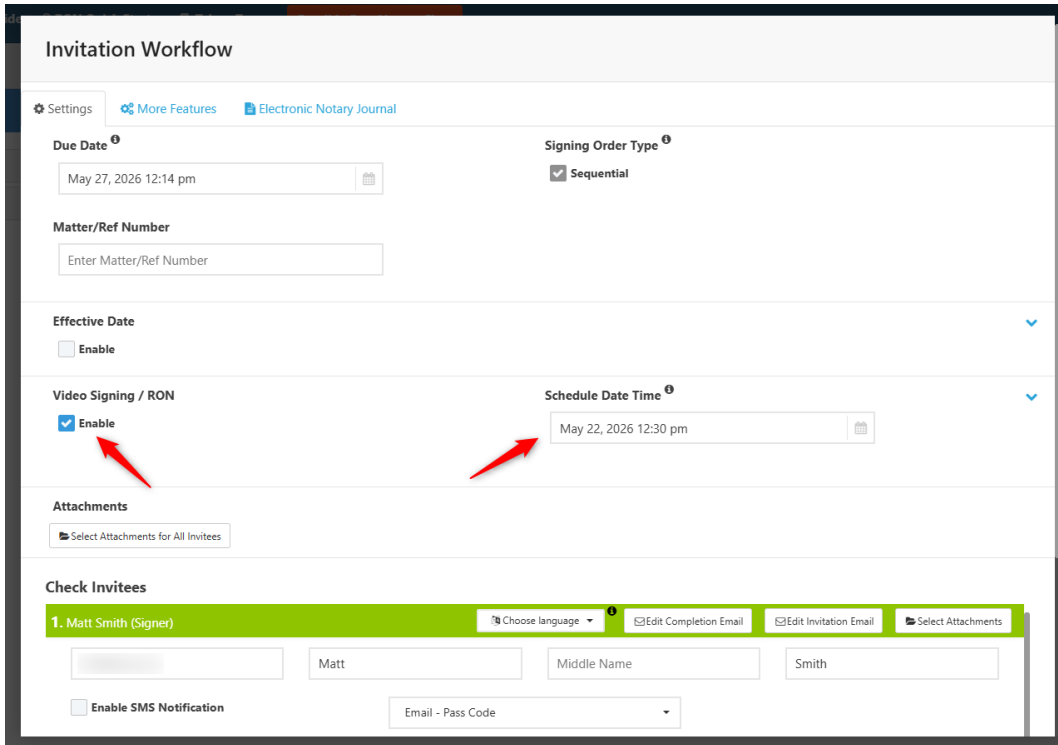
You can either leave your notary stamp and signature empty, so you can select a notary user when sending the template, or you can select a default notary for this template in the 'Add Notary Signature' dropdown.



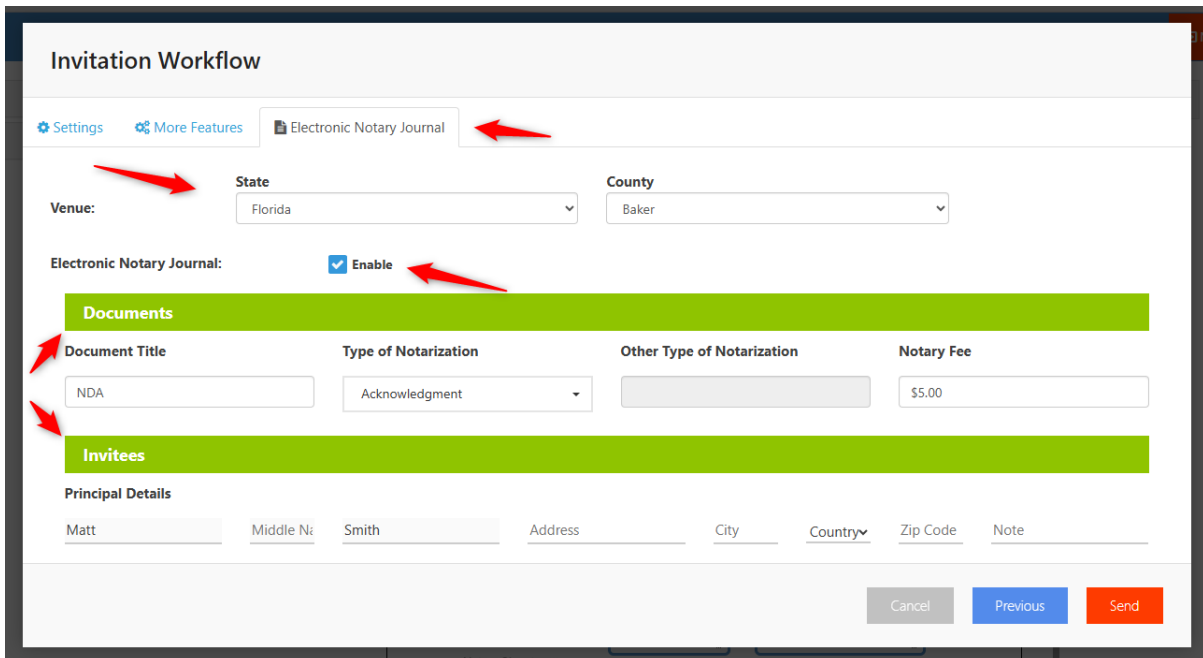
You can enable RON for templates that you have added a notary stamp and signature to by going to **My Documents > Templates**, selecting the template(s), then clicking **Send** to open the invitation workflow.



In the invitation workflow, enable **Video Signing / RON** and schedule a date and time for the meeting.



Go to the **Electronic Notary Journal** tab to select a state and county for the venue, choose if you'd like the electronic notary journal to be enabled for this RON process, and enter the required details if you do leave it enabled.

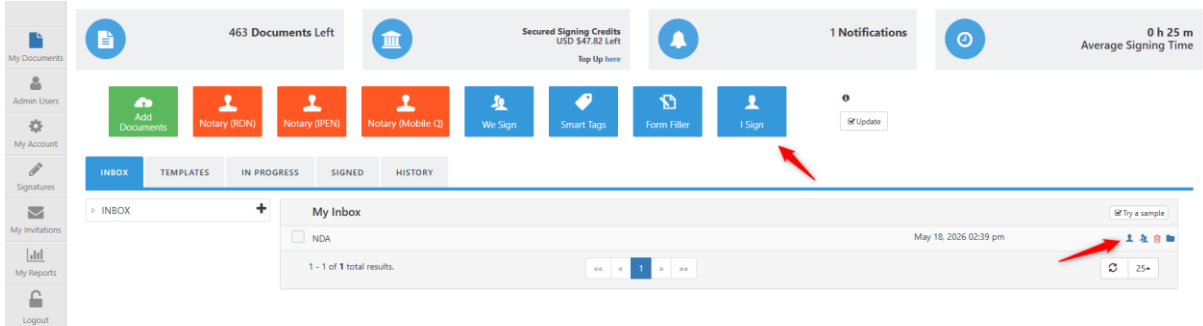


Change any other settings and enable/disable features in the invitation workflow as needed and finally click **Send** to send invitations to the RON meeting.

### Notary in I Sign

To notarize a document that only the notary must sign, you can use **I Sign**. The notary can stamp and sign the document without sending out an invitation for signing.

First go to **My Documents > Inbox** and either click **I Sign** and upload the document you need to notarize, or if you have already uploaded the document, find it in the inbox and click this icon to open it in the I Sign designer:

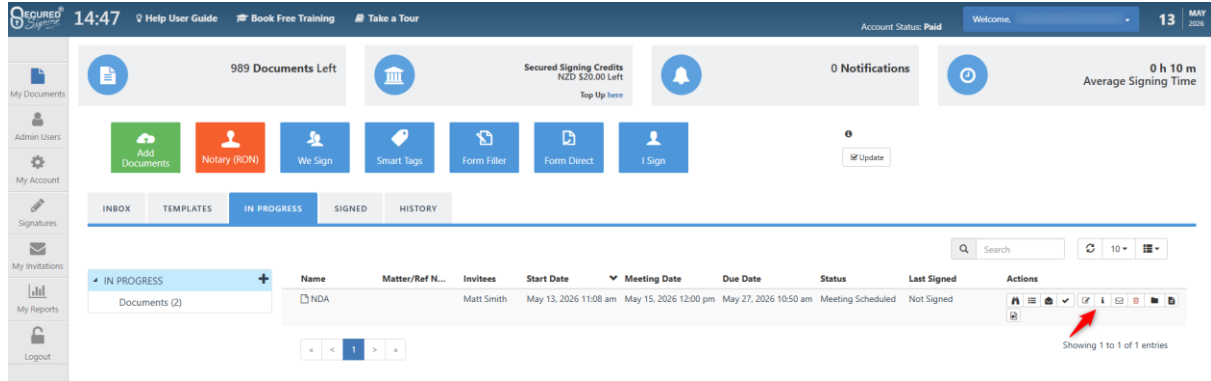


Then, in the I Sign designer, simply place your notary stamp and signature as needed, and finally click **Sign** to sign and stamp the document.

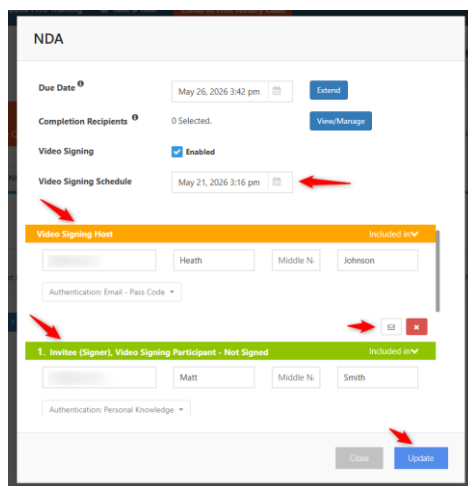


### Check and Update In Progress RON Documents

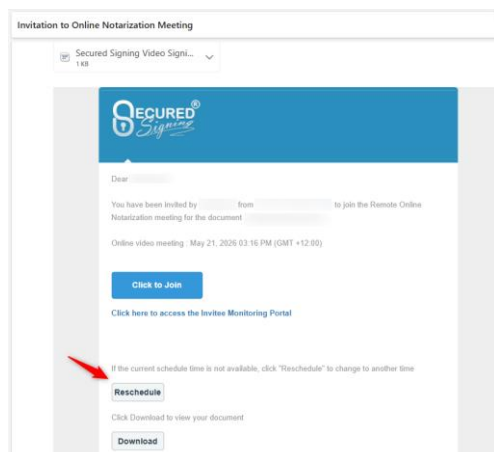
You can check the signing status of RON documents at any time from the ‘In Progress’ tab in the ‘My Documents’ page. You can click on the ‘i’ icon to check the signing progress or make changes, and you can also click the ‘View notary journal’ button to check the electronic notary journal and even add comments.



Clicking the ‘i’ icon will display a pop-up in which you will see which invitees have signed the document(s), and you can reschedule the RON meeting and change invitee details. You can also send reminder emails. Make sure to click ‘Update’ after you have finished making any required changes.



The host can also reschedule the RON meeting from the invitation email by clicking ‘Reschedule’.

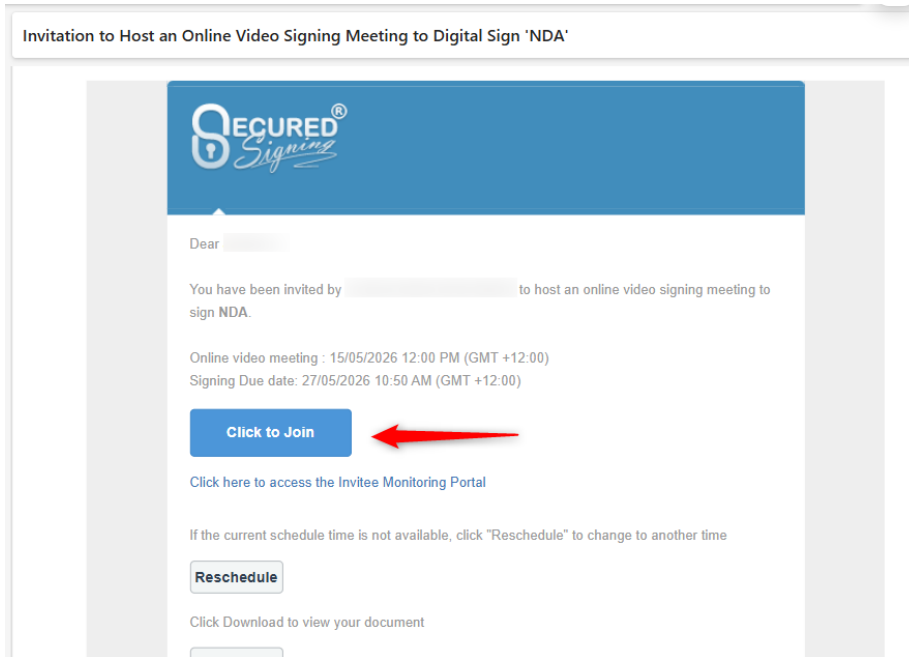


## RON Meeting Process

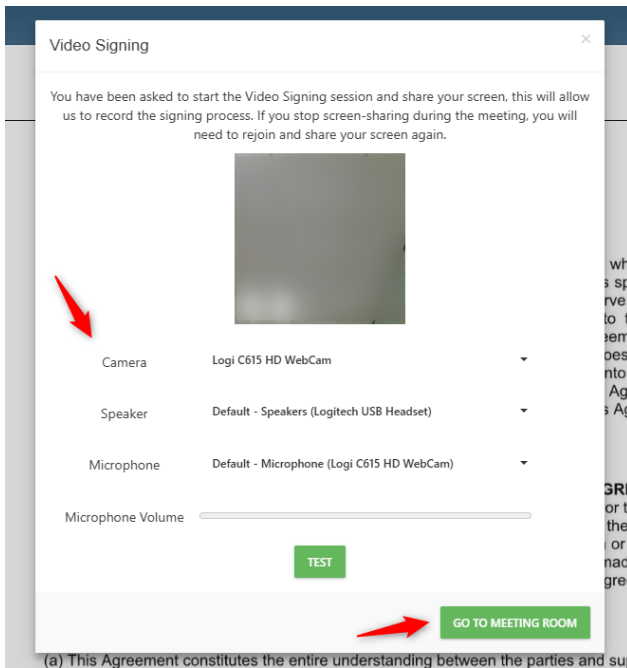
### Starting the RON Meeting

The RON meeting is started by the notary/host (the notary is not always the host), and all participants must wait until the host starts the meeting before they can join.

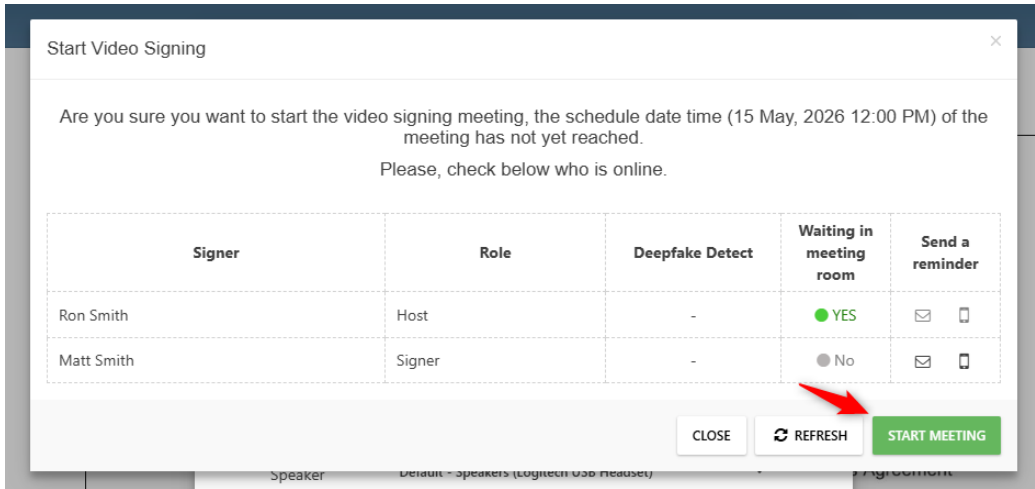
The host starts the meeting by first opening the link in their invitation email to host the video signing meeting.



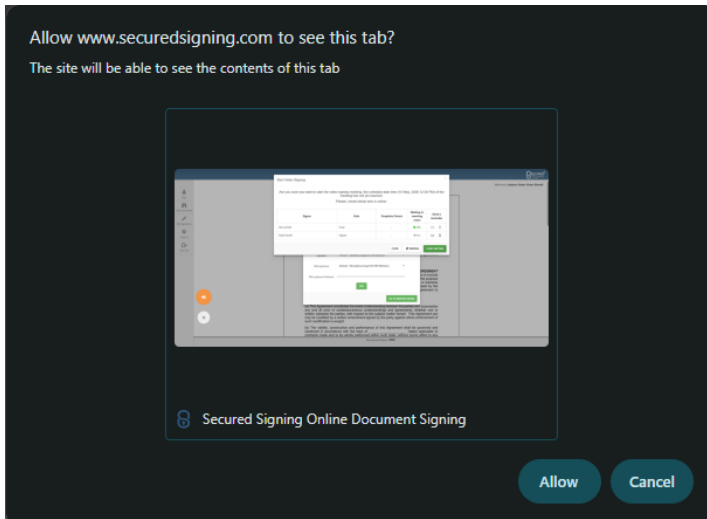
Then the host can select their webcam, speaker, and microphone, before clicking 'Go to Meeting Room'.



The host can see which invitees are waiting in the meeting room and can start the meeting by clicking ‘Start Meeting’.



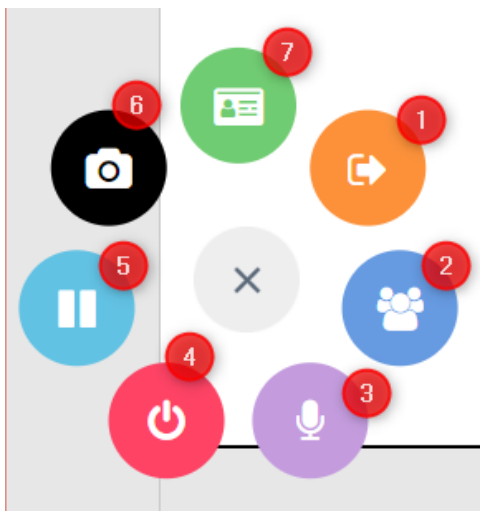
The host will be required to share their screen for the RON meeting recording.



### In the RON Meeting

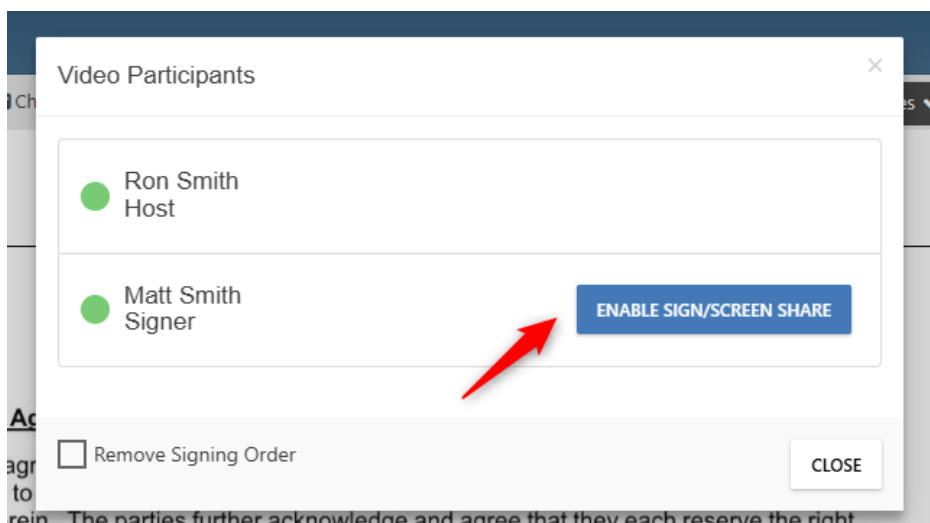
In the bottom left corner of the page, the host has the following buttons to control the RON meeting:

1. Leave Meeting – clicking will leave the meeting. Please note that if the host leaves, the meeting will end after 5 minutes.
2. Start to Manage Signers – allows you to enable signing for the next invitee.
3. Mute – mutes/unmutes your microphone.
4. End Video Signing – allows you to end the video signing meeting and optionally reschedule it.
5. Pause Recording – pauses the video signing recording.
6. Snapshot – allows you to take a snapshot of an invitee’s webcam.
7. ID Visual Check – Check the invitees’ ID verification results (this button only displays if at least 1 invitee is using ID verification).



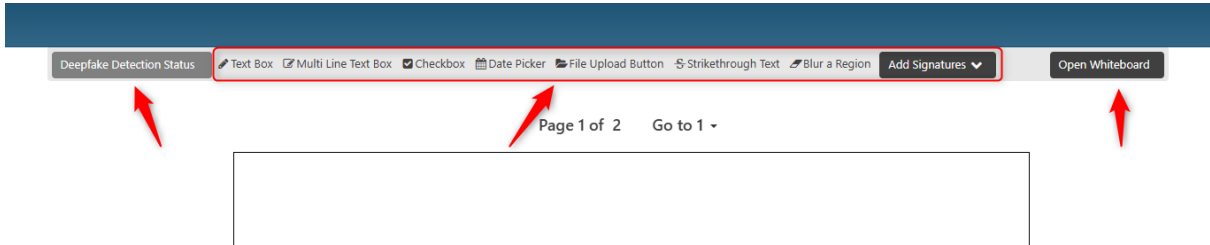
The ‘Start to Manage Signers’ button displays a pop-up where the host can manage who is currently sharing their screen and signing the document(s). The host can enable signing for the next invitee by clicking ‘Enable Sign/Screen Share’.

After the host clicks ‘Enable Sign/Screen Share’, the invitee will be prompted to share their screen, then sign the document.



As the host, you can add fields and additional signatures during a RON meeting from the control bar near the top of the page.

Other controls include checking deepfake detection status if applicable and opening the Whiteboard if that setting is enabled in your RON video signing settings.

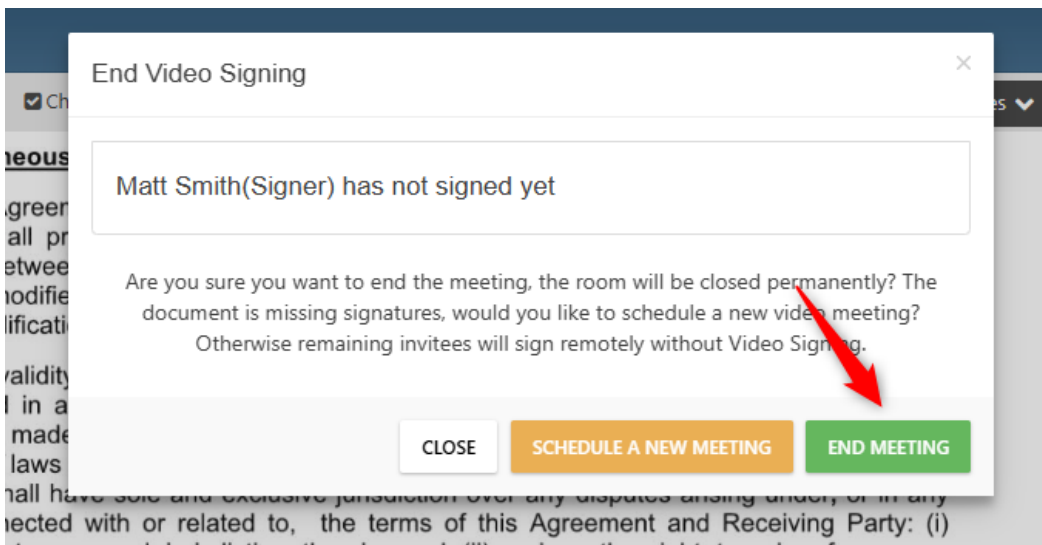


On the left side of the document, the host can see a tag labelled 'Sync All Here'. Clicking this button will make all invitees currently in the meeting scroll to that place in the document.



The host can end the RON meeting at any time by clicking the 'End Video Signing' button. If all invitees have signed, the host can confirm they would like to end the meeting, then the meeting will end and all invitees will receive their completion email.

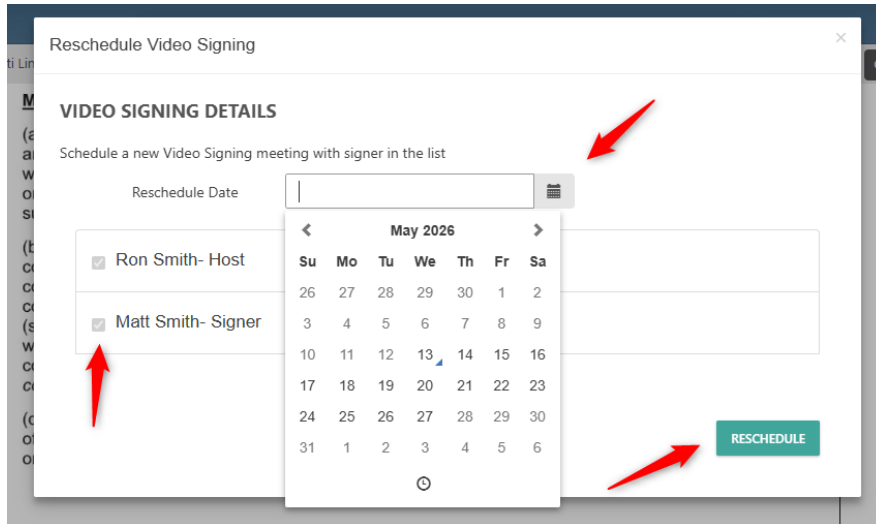
If there are still invitees that haven't signed or the notary still hasn't signed, the host can choose to end the meeting by clicking 'End Meeting', and the sender can schedule a new meeting to complete the RON process later from the 'i' icon pop-up in the 'In Progress' tab in their account.



The host can also choose to schedule a new meeting at a different date and time by clicking the ‘Schedule a New Meeting’ button.

Then, in the ‘Reschedule Video Signing’ pop-up, select the date and time for the new meeting, select which remaining invitees you would like to be invited to the new meeting, then click ‘Reschedule’.

New invitation emails will be sent out to participants for the new video signing meeting.



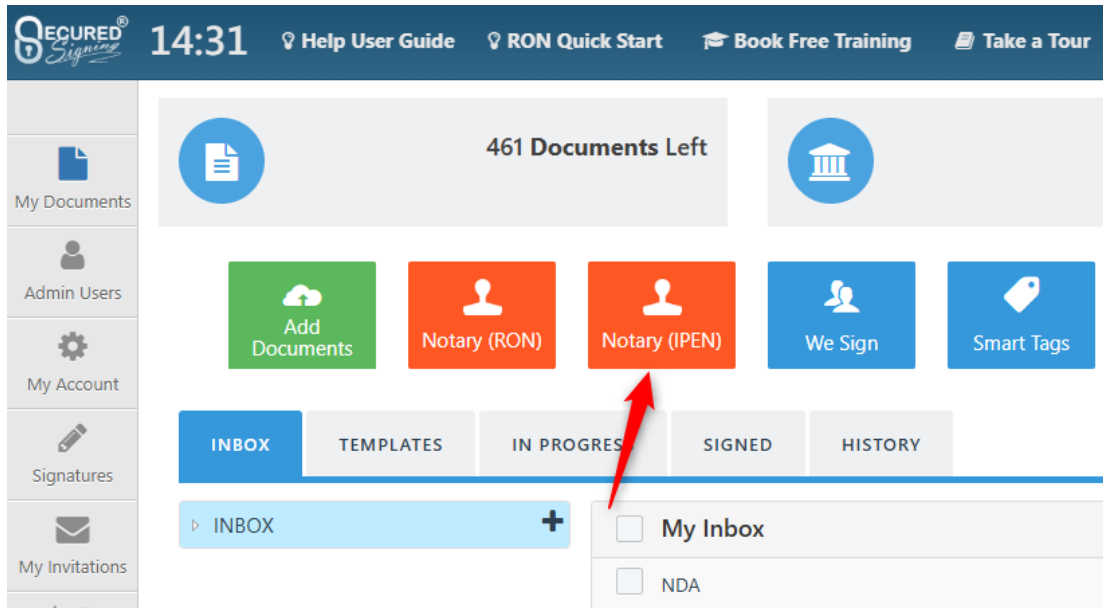
## In Person Electronic Notarization (IPEN) Process

Our In Person Electronic Notarization (IPEN) software allows you to prepare your documents in Secured Signing to be signed and notarized on your computer in a face-to-face meeting with your invitees.

### Preparing for an In Person Electronic Notarization

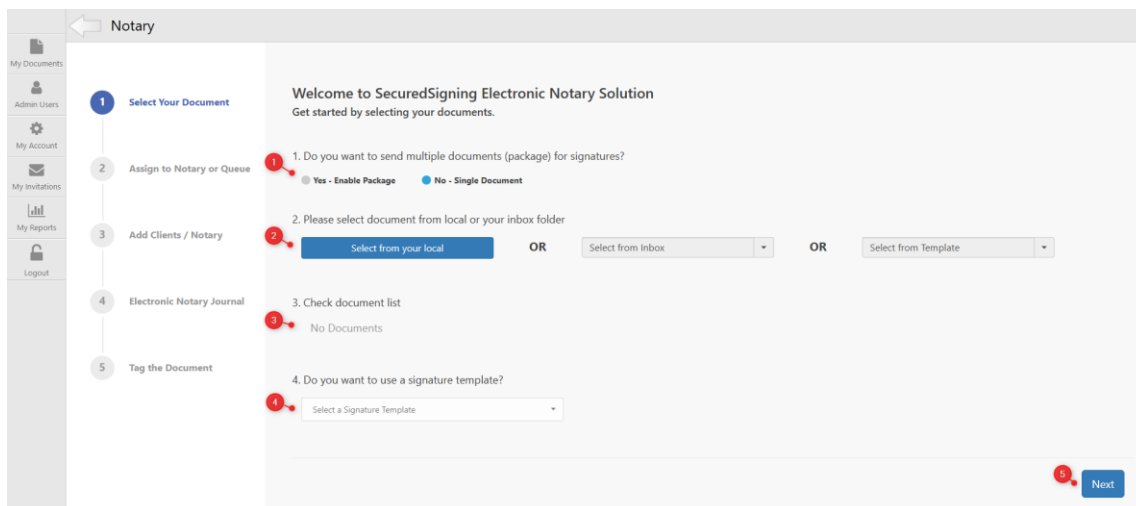
#### IPEN Wizard

To get started prepping your document(s) for notarization using the IPEN Wizard, go to 'My Documents' and click the 'Notary (IPEN)' button.



In the **Select Your Document** page:

1. You can send a single document or create a package of multiple documents.
2. Upload a document from your PC or a cloud storage provider, select a document from your Secured Signing inbox, or select a Form Filler template.
3. Check your document list.
4. Optionally, select a signature template.
5. Finally, click 'Next' to continue to the next page.



In the **Assign to Notary or Queue** page:

1. Choose whether you would like to assign the IPEN process to a notary or a notary queue.
2. Click 'Next' to continue to the next page.

In the **Add Clients / Notary** page:

1. Add invitees, enter their email addresses and full names, and enter their mobile numbers to send a code to for them to access the document.
2. Select the notary that will notarize this IPEN session. By default the sender will be selected.
3. Select the venue where the notarization will take place. By default, the selected notary's state and county will be selected.
4. Click 'Next' to continue to the next page.

In the **Electronic Notary Journal** page:

1. Optionally, disable the Electronic Notary Journal.
2. Edit the document title, select the type(s) of notarization, and enter the notary fee for each of the documents listed.
3. Enter the required details for each invitee under ‘Principal Details’.
4. Click the ‘Start Tagging’ button to start tagging the document.

Electronic Notary Journal

Use Electronic Notary Journal

Document Title	Type of Notarization	Other Type of Notarization	Notary Fee
NDA	Acknowledgment		\$5.00

Principal Details

Matt Middle Nam Smith 12 Main Street Manhattan New York 11355 Note

Previous Start Tagging

### Tagging and Sending the Document

Before sending out the invitation for an IPEN meeting the document needs to be prepared by adding form fields, signatures for the invitee(s) and the notary, and notary stamps.

NDA

+ Add Invitee Add Notary Signature Add Form Field Add Broadcast Signature Remove Signature Template Next

Font Font Size B I A [Icons]

**Miscellaneous.**

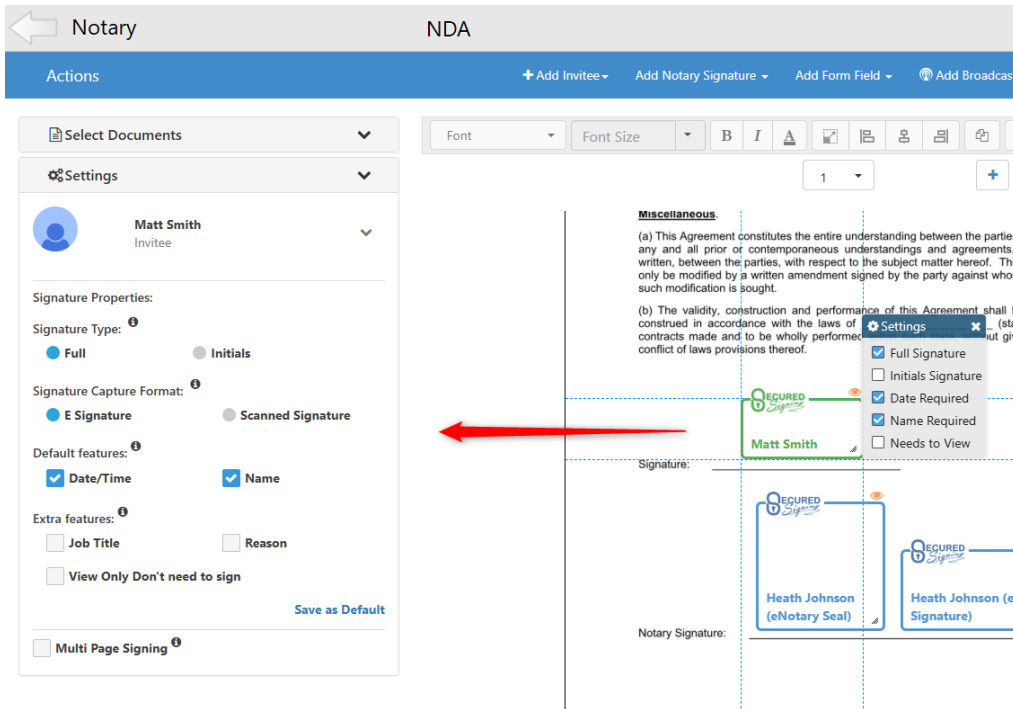
(a) This Agreement constitutes the entire understanding between the parties and supersedes any and all prior or contemporaneous understandings and agreements, whether oral or written, between the parties, with respect to the subject matter hereof. This Agreement can only be modified by a written amendment signed by the party against whom enforcement of such modification is sought.

(b) The validity, construction and performance of this Agreement shall be governed and construed in accordance with the laws of \_\_\_\_\_ (state) applicable to contracts made and to be wholly performed within such state, without giving effect to any conflict of laws provisions thereof.

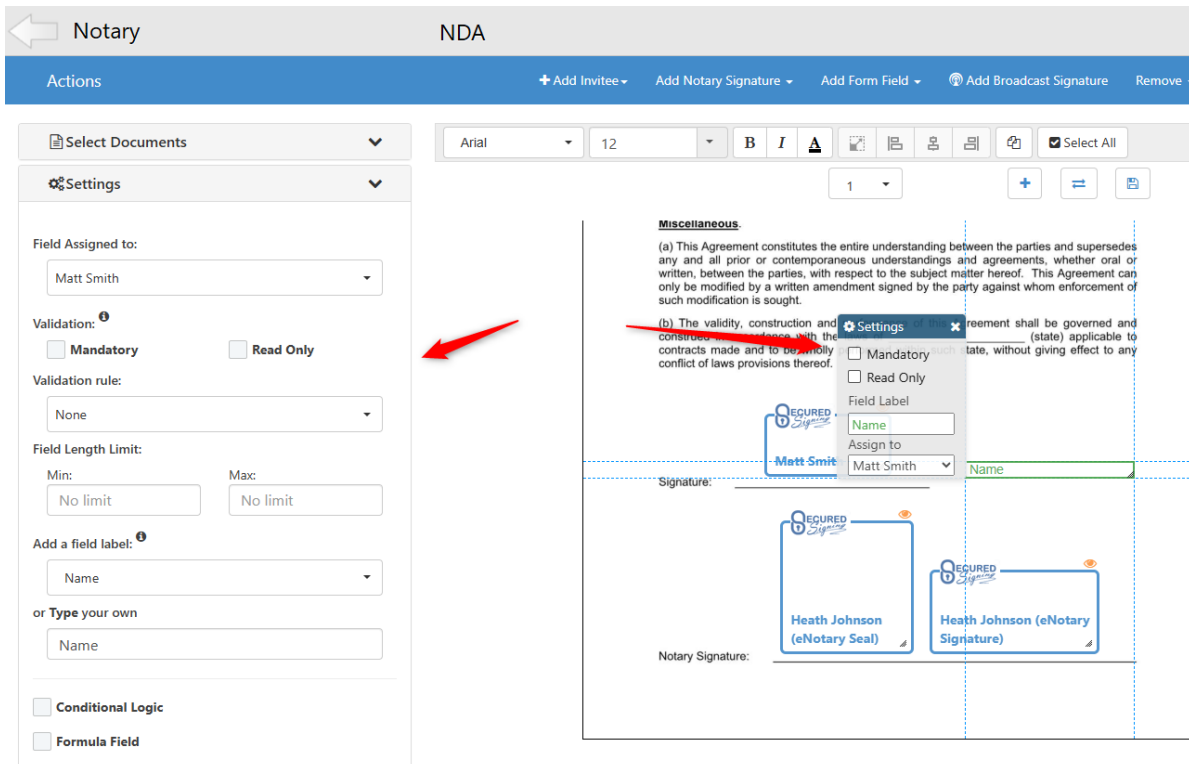
Signature: Name

Notary Signature:

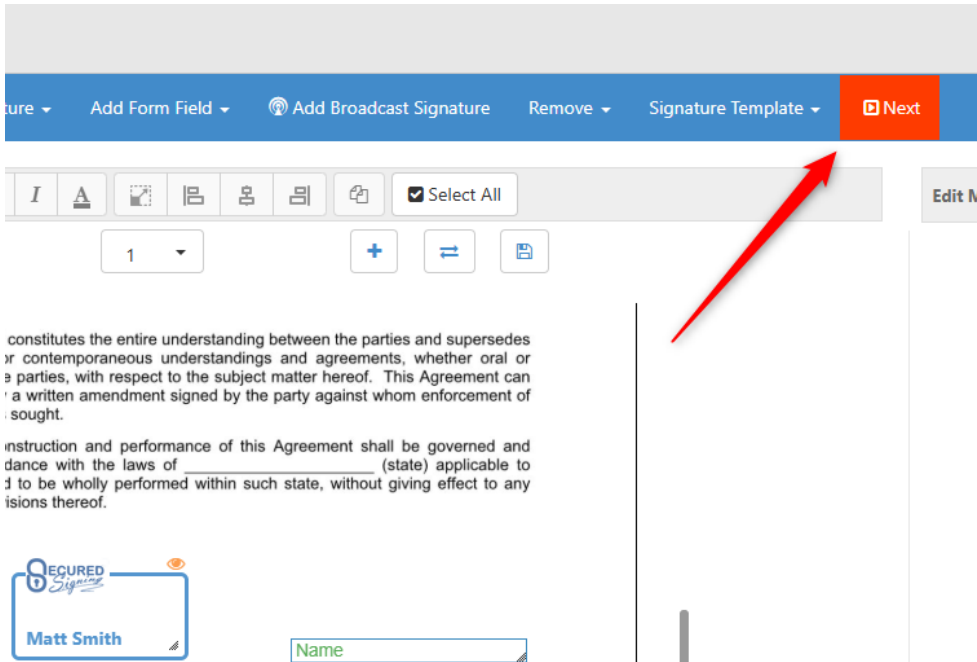
You can change settings for invitee signatures if needed, such as changing from a full signature to initials, and enabling extra features that will show additional details on the signed signatures such as job title and reason for signing.



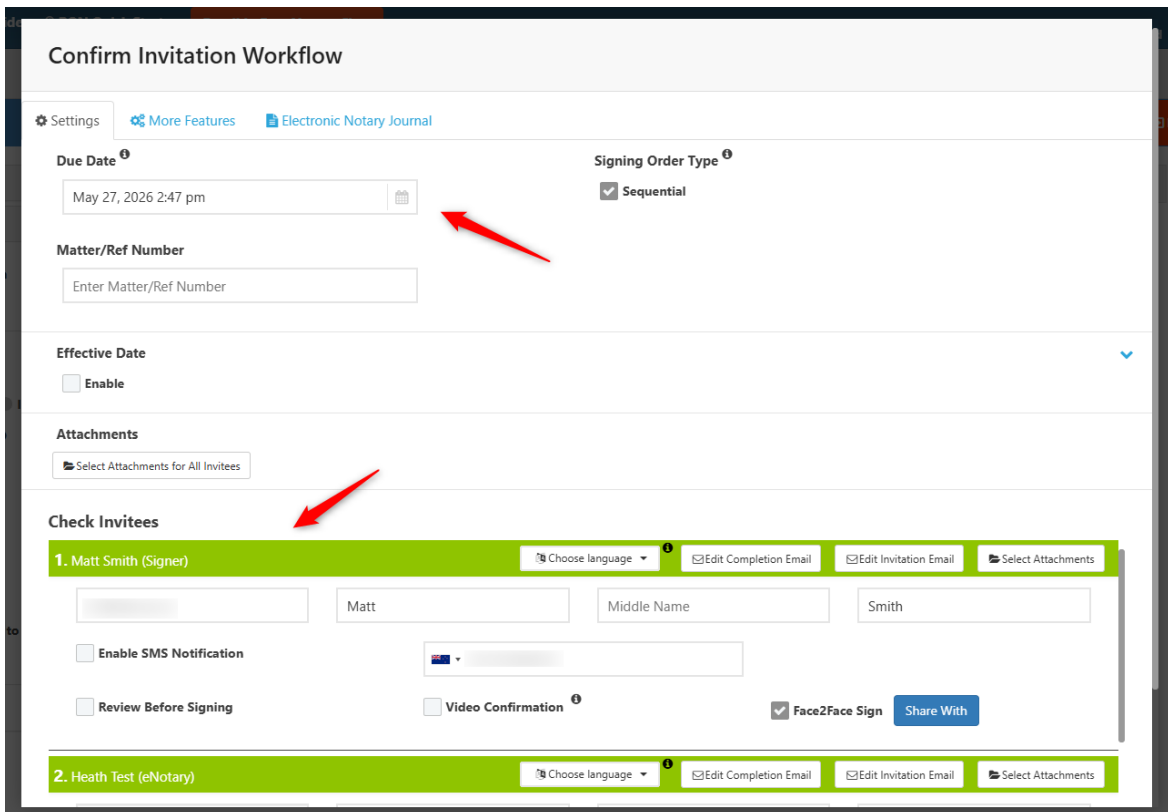
You can also change settings for form fields by selecting them, then changing the settings in the 'Settings' section on the left side of the page, or in the box that display next to the field if it is enabled in your account.



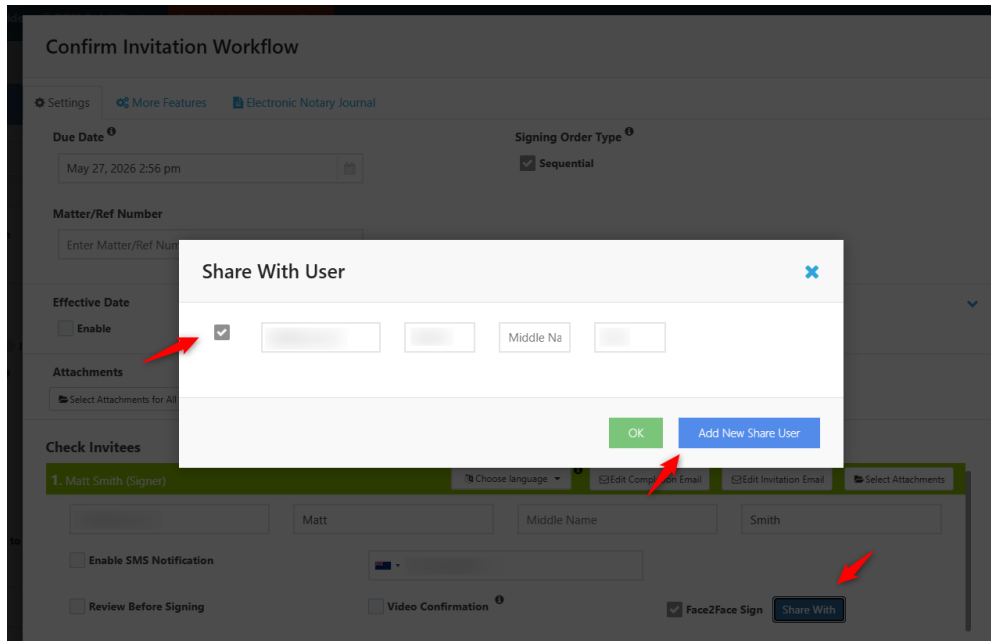
Once all signatures, stamps, and form fields have been added to the document. Click ‘Next’ to continue to the invitation workflow.



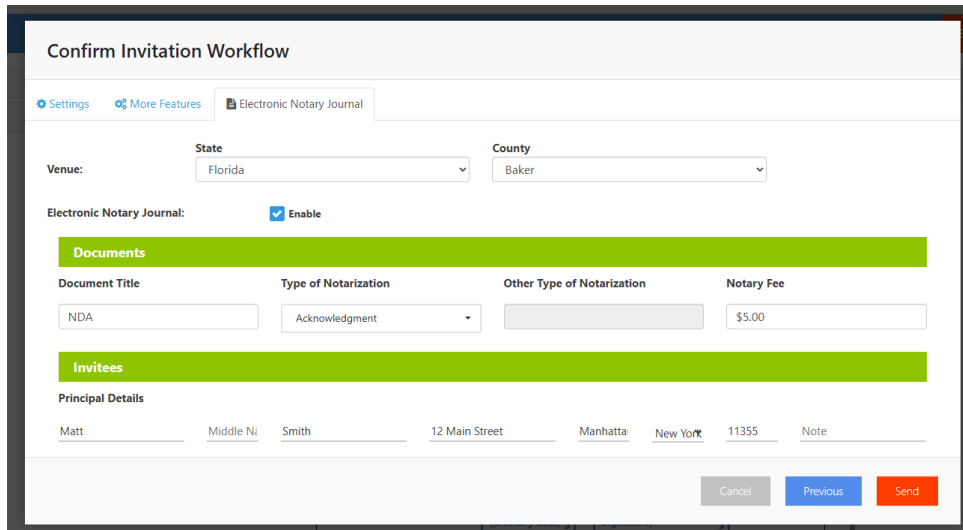
In the invitation workflow pop-up, you can change the due date, change invitee details, and enable extra features.



You can also add additional ‘Share Users’ by clicking the ‘Share With’ button. In the ‘Share With User’ pop-up you will see that the notary will already be added, and you can add additional users by clicking ‘Add New Share User’. Any user added here will be able to open the document on their computer and allow the invitee(s) and notary to sign. If the sender is not also selected as the notary, they will be added as a share user automatically.



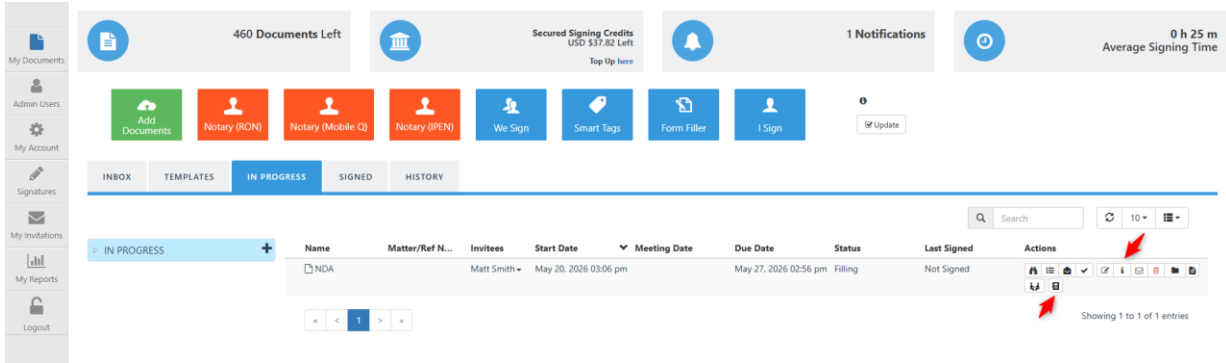
You can also make changes to the electronic notary journal if needed.



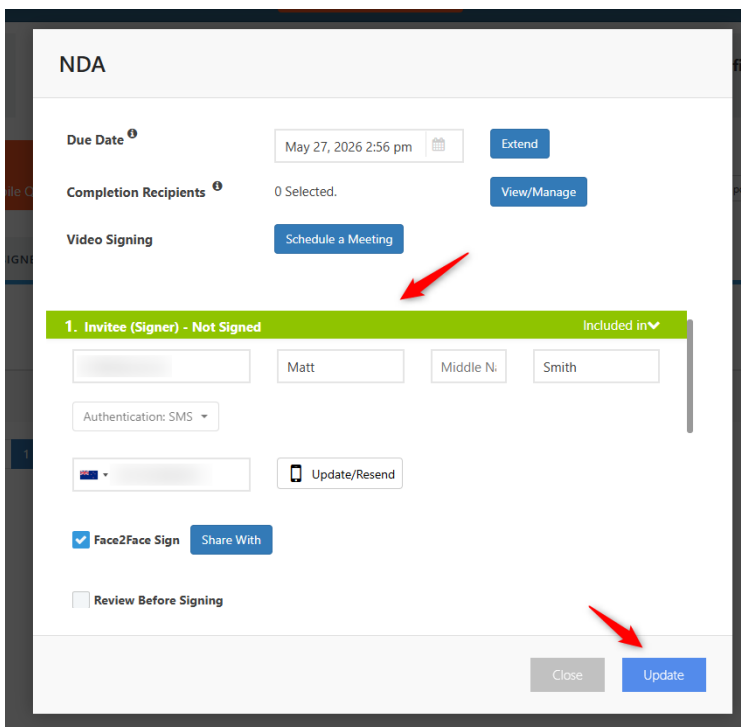
Finally, click **Send** to send the document(s) out for signing and notarization. The notary and the other share users (if additional ones are added) will receive notification emails.

### Check and Update In Progress IPEN Documents

You can check the signing status of IPEN documents at any time from the ‘In Progress’ tab in the ‘My Documents’ page. You can click on the ‘i’ icon to check the signing progress or make changes, and you can also click the ‘View notary journal’ button to check the electronic notary journal and even add comments.



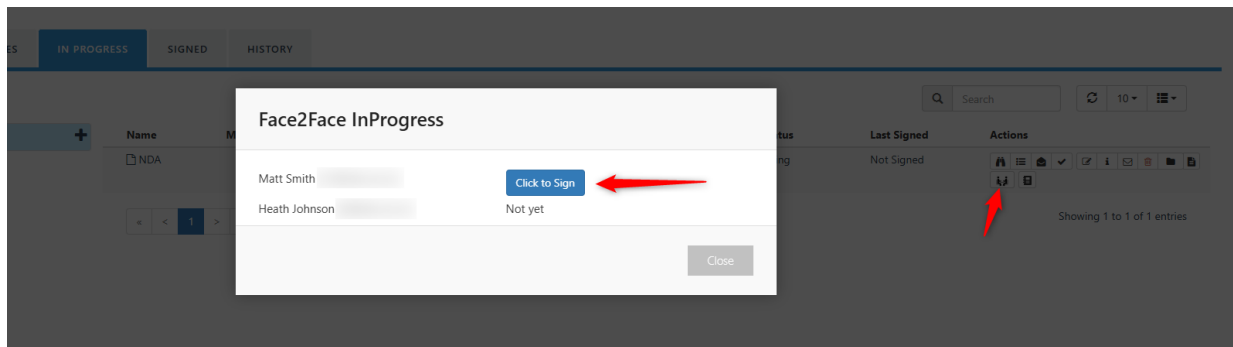
Clicking the ‘i’ icon will display a pop-up in which you will see which invitees have signed the document(s), and you can change invitee details. Make sure to click ‘Update’ after you have finished making any required changes.



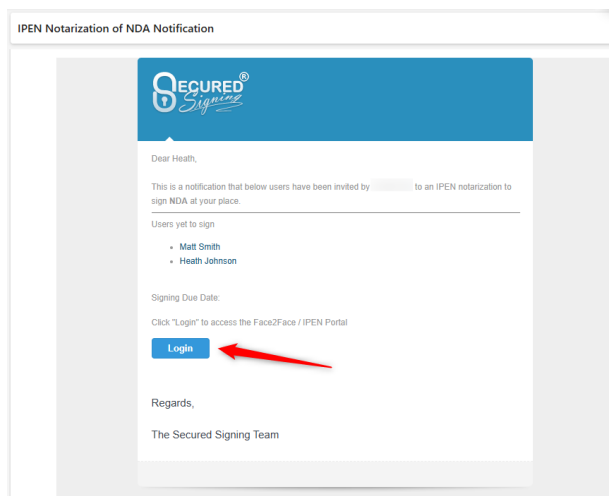
### Signing and Notarizing the IPEN Document(s)

To start signing the IPEN document(s), the notary/share user must first open the document on their computer, sending an SMS code to the invitee’s mobile phone, allowing them to access the document and sign.

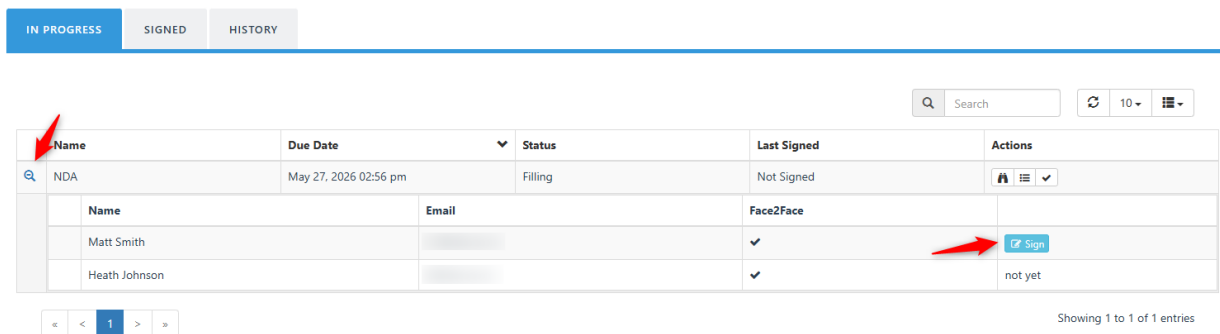
The notary/share user can open the document either by logging into their Secured Signing account, going to the **In Progress** tab in the ‘My Documents’ page, clicking the ‘Continue Face2Face signing’ button in the ‘Actions’ column for their document/package, and finally clicking **Click to Sign**:



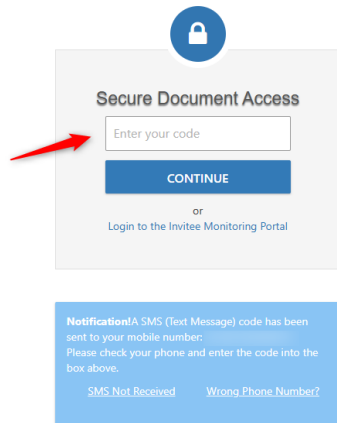
Or the notary/share user can login to the Face2Face / IPEN Portal first by clicking the ‘Login’ button in their IPEN notification email:



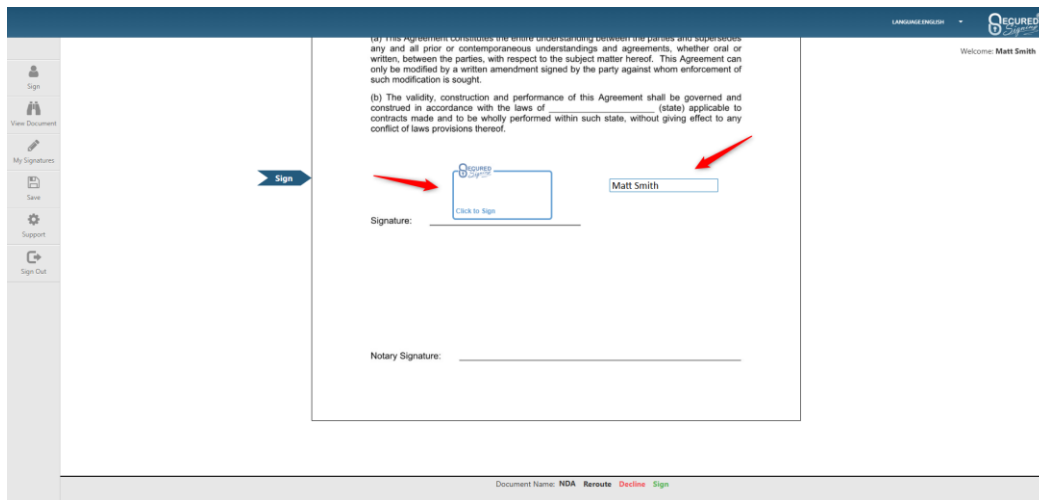
Then the notary/share user should go to the **In Progress** tab, click the 🔍 icon for their document/package, and finally click the **Sign** button:



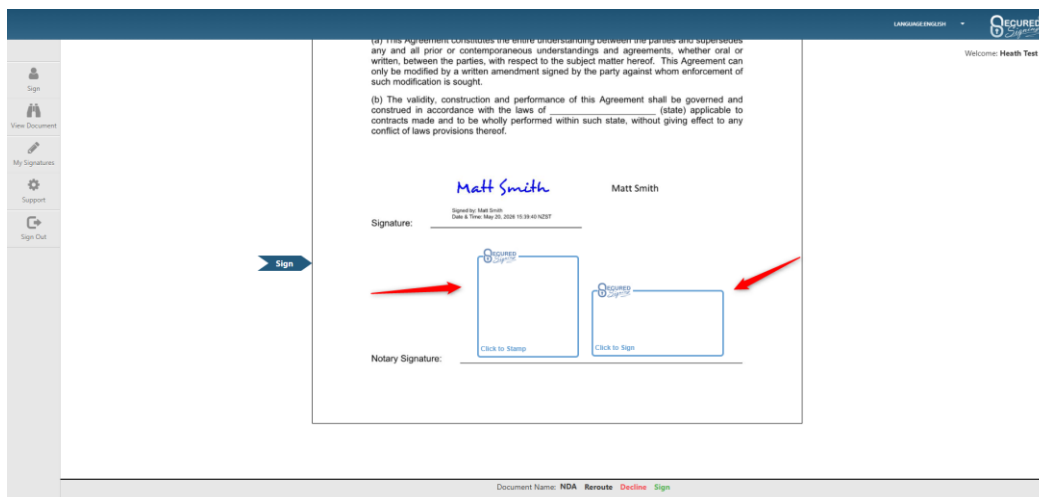
The notary/share user will be taken to the ‘Secure Document Access’ page, and the invitee will receive an SMS code that they must enter in this page to access the document.



Now the invitee can fill and sign the document.



Once all invitees have signed, the notary can sign and notarize the document the same way, by going to the ‘Continue Face2Face signing’ pop-up in their account, or logging into the Face2Face / IPEN Portal and clicking ‘Sign’ to access the document, then filling, signing, and stamping the document.



## Notary Queue

### Overview

Creating a notary queue allows you to tag a notary document/package, assign it to the notary queue, and then any notary in your account that you added to that queue can assign the document/package to themselves to finish prepping and send it for signing and notarization.

We have 2 types of notary queues; internal queues and outsource queues. Internal queues are only for the notaries in your account to add documents to and take documents from. Outsource queues allow an external company that you select to take your document(s) and handle the notarization process.

There are also 2 different types of outsource queue, online outsource queues and mobile outsource queues. The online outsource queue allows you to add documents that will be signed in a Remote Online Notarization (RON) session or an In Person Electronic Notarization (IPEN) session. The mobile outsource queues allows you to add documents that will be printed out and signed and notarized in person and on paper, then scanned and uploaded back into Secured Signing once completed.

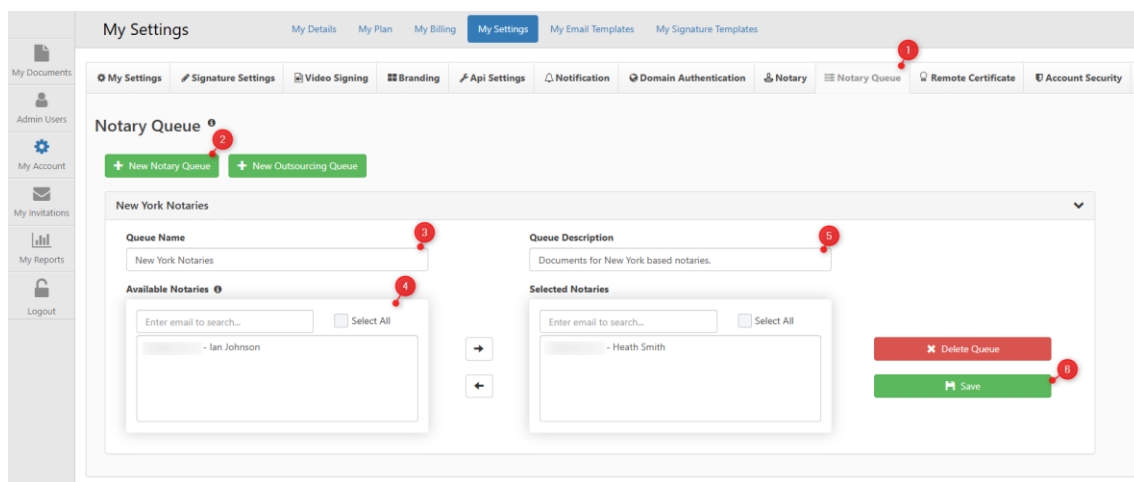
### Create a Notary Queue

#### Internal Queue

Admin users in a business account or an enterprise account can create unlimited queues and can assign any available notaries to those queues. Please note that you need at least 2 notary users in your account to create an internal notary queue.

To create an internal notary queue:

1. Go to **My Account > My Settings > Notary Queue**.
2. Click **New Notary Queue**.
3. Enter a queue name.
4. Select the notaries you would like to have access to the queue.
5. Optionally, enter a queue description.
6. Click **Save**.



## Outsource Queue

Admin users in a business account or an enterprise account can create online or mobile outsource queues and select which external notary/company will take documents from the outsource queues to sign and notarize.

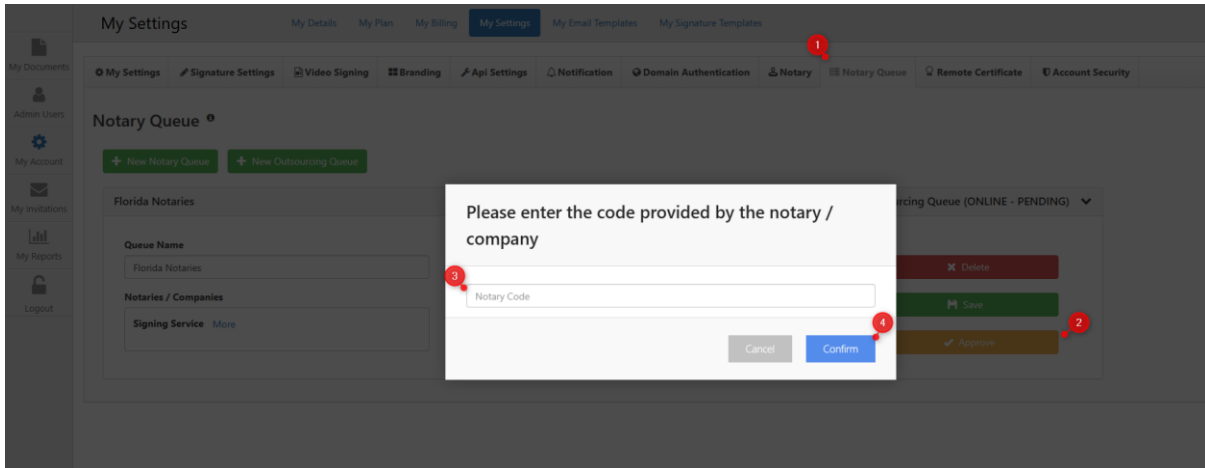
To create an outsource notary queue:

1. Go to **My Account > My Settings > Notary Queue**.
2. Click **New Outsourcing Queue** and agree to the ‘Outsource Queue Usage Terms’.
3. Select the either **Online** or **Mobile** as the ‘Outsourcing Queue Type’.
4. Enter a queue name.
5. Select the notary/company you would like to be able to take documents from the the queue to sign and notarize.
6. Optionally, enter a queue description.
7. Click **Save** and confirm that you would like to create the outsource queue.

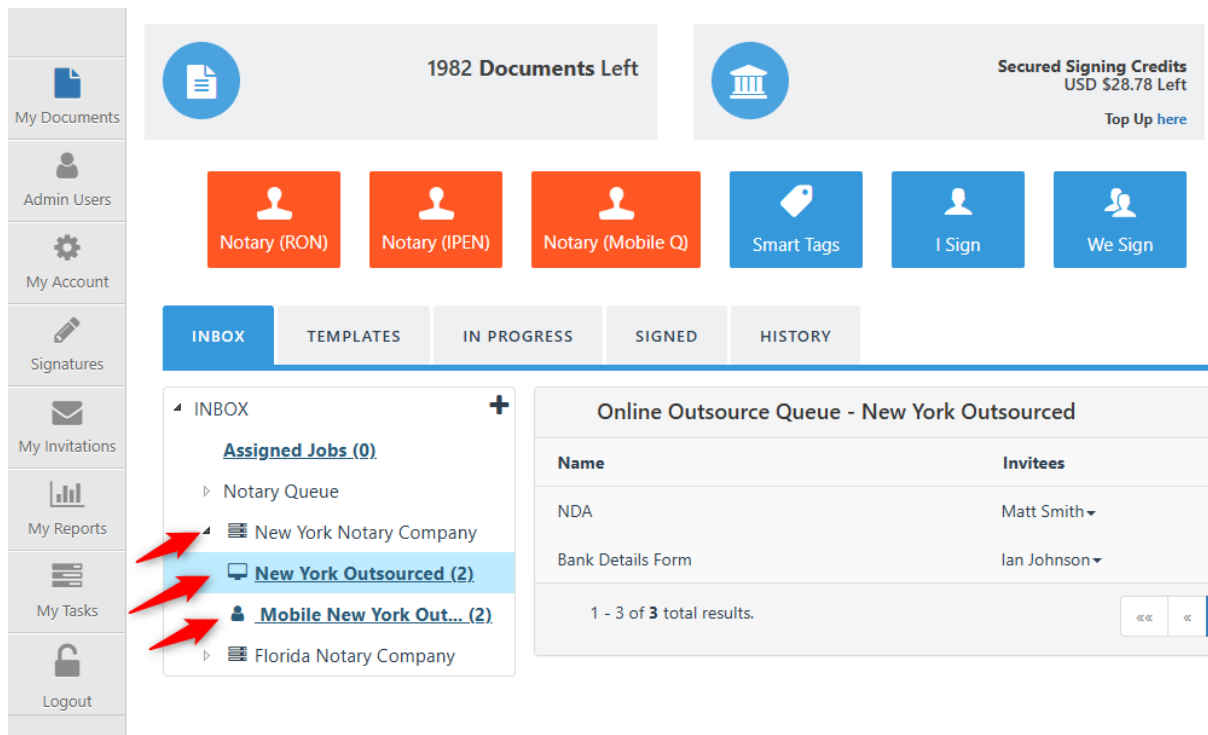
After creating and saving the outsource queue, the notary/company you selected for the queue will receive an email notifying them that you have added them to an outsource queue, and that contains an authorization code and your contact details. Before they can start taking documents from the outsource queue, they will have to provide you authorization code.

Once you have received this authorization code from the notary/company:

1. Go back to **My Account > My Settings > Notary Queue** and open the outsource queue you created before.
2. Click **Approve**.
3. Enter the authorization code given to you by the notary/company.
4. Click **Confirm**.



If you are a notary in a company that has been added to one or more outsource queues by at least one account, you will see a new folder in **My Documents > Inbox**, identified with the following icon and containing the account’s company name: . Under that folder, you will see subfolders for each outsource queue that that account has added you to, with **online** outsource queues identified with this icon: , and **mobile** outsource queues with this icon: .



## Assign Documents to a Notary Queue

### Internal Queue or Outsource Queue

To assign documents to an internal queue or an outsource queue, start by going to ‘My Documents’, then clicking either the **Notary (RON)** or **Notary (IPEN)** button to go to the RON or IPEN wizard.

Select your documents as usual, then in the ‘Schedule RON Meeting’ page in the RON wizard, or the ‘Assign to Notary or Queue’ page in the IPEN wizard, when asked who you are assigning this notary process to, select **Queue – Internal** to assign to an internal queue or **Queue – Outsource** to assign to an outsource queue.

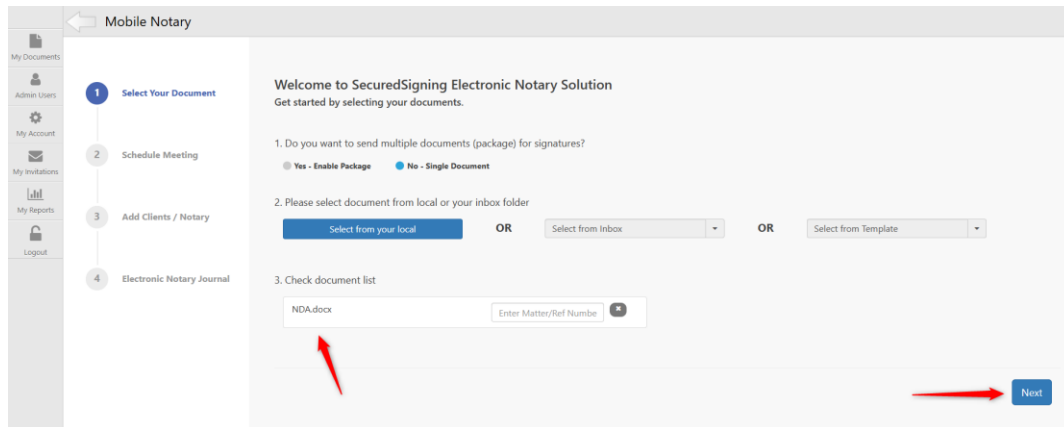
Then, in the ‘Add Clients / Notary’ page, you will be able to select to which queue you would like to assign the document(s). From here, you can immediately submit the document(s) to the queue after entering invitee details, or you can continue to tag the document before submitting the document to the queue.

Once documents are submitted to the queue, all notaries assigned to the queue will receive a notification email, and the invitee(s) will receive one too.

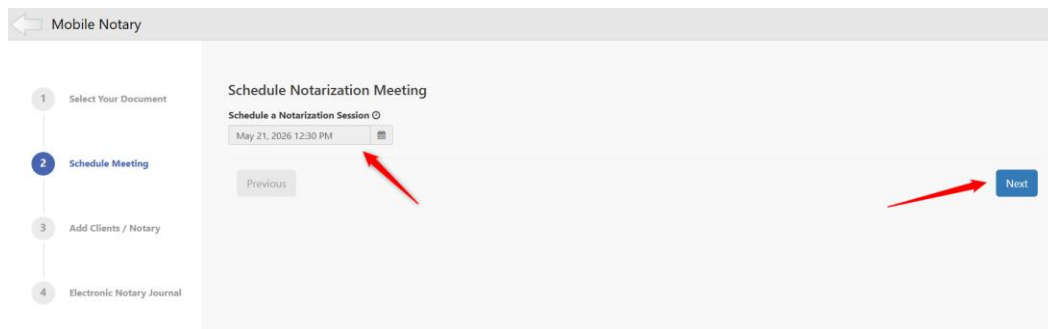
### Mobile Outsource Queue

To assign documents to a mobile queue, start by going to ‘My Documents’, then clicking the **Notary (Mobile Q)** button to go to the Mobile Queue wizard.

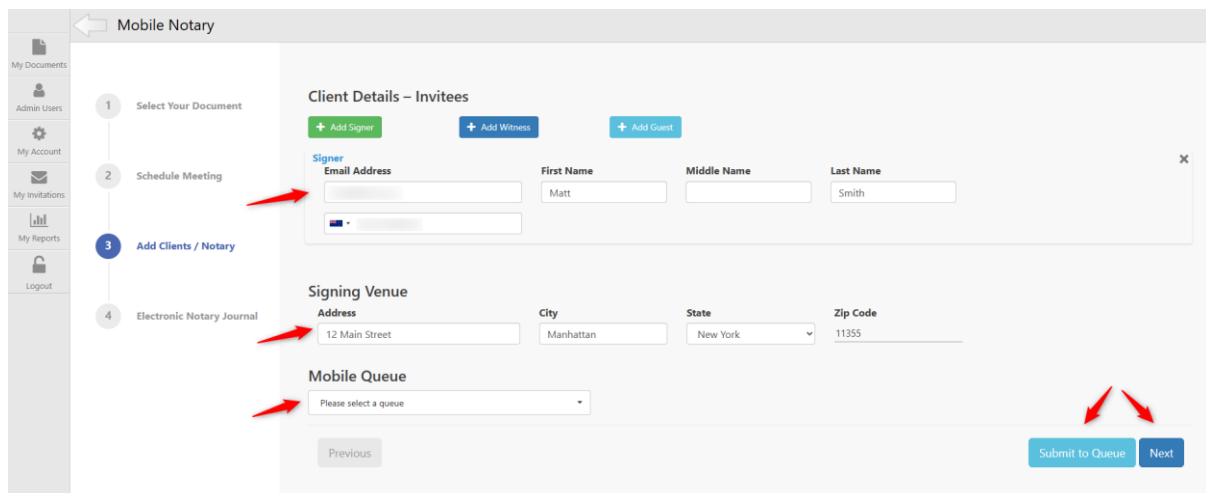
In the ‘Select Your Document’ page, select the document(s) that you would like to assign to a mobile queue, then continue to the ‘Schedule Meeting’ page.



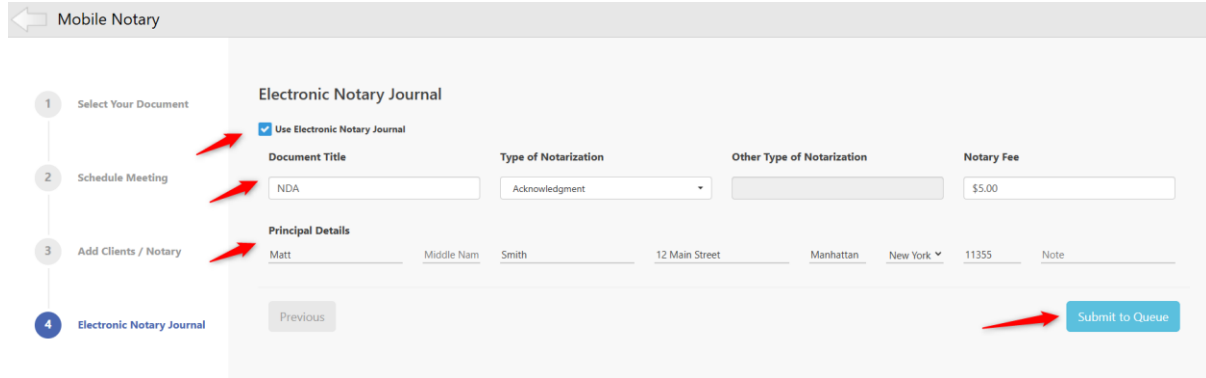
In the ‘Schedule Meeting’ page, select a date and time for the meeting, then continue to the ‘Add Clients / Notary’ page.



In the ‘Add Clients / Notary’ page, add the invitee(s) that will be signing document or present for the notarization, entering their email, full name, and mobile number. Then, if you know the address where the notarization will take place, fill out the signing venue details. Finally, select which mobile queue to add the documents to and click ‘Next’ to continue to the ‘Electronic Notary Journal’ page, or click ‘Submit to Queue’ to add the document to the mobile queue now.



In the ‘Electronic Notary Journal’ page, you can choose to keep the electronic notary journal enabled, or to disable it. If you keep it enabled, edit the document title, select the type(s) of notarization, and enter the notary fee for each of the documents listed. Then, enter the required details for each invitee under ‘Principal Details’. Finally, click ‘Submit to Queue’ to add the document to the mobile queue.



The screenshot shows the 'Electronic Notary Journal' form within the 'Mobile Notary' interface. On the left, a vertical navigation bar lists four steps: 1. Select Your Document, 2. Schedule Meeting, 3. Add Clients / Notary, and 4. Electronic Notary Journal. The fourth step is currently active. The main form area is titled 'Electronic Notary Journal' and contains the following fields and controls:

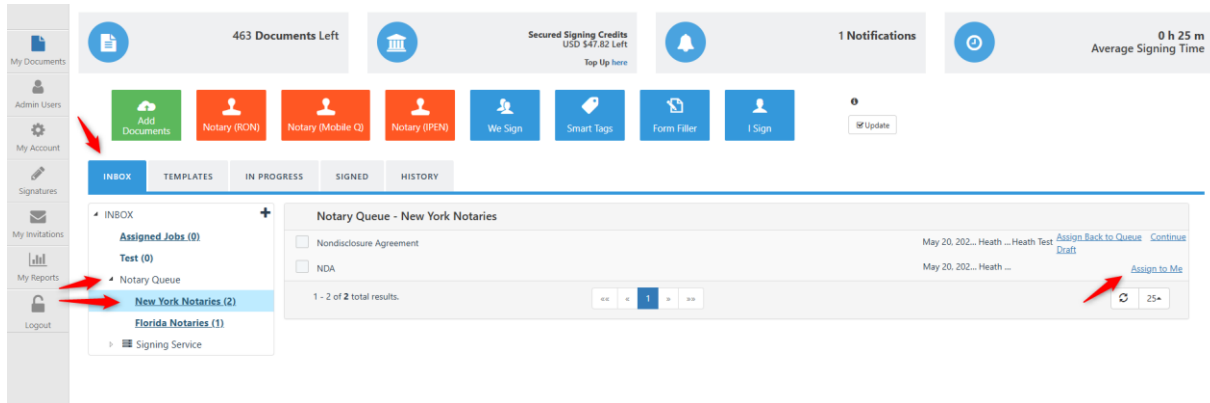
- Use Electronic Notary Journal
- Document Title:** A text input field containing 'NDA'.
- Type of Notarization:** A dropdown menu with 'Acknowledgment' selected.
- Other Type of Notarization:** An empty text input field.
- Notary Fee:** A text input field containing '\$5.00'.
- Principal Details:** A series of text input fields for: Name (Matt), Middle Name (Middle Nam), Last Name (Smith), Address (12 Main Street), City (Manhattan), State (New York), Zip (11355), and Note.
- Navigation:** A 'Previous' button on the left and a 'Submit to Queue' button on the right.

Red arrows in the original image point to the 'Use Electronic Notary Journal' checkbox, the 'Document Title' field, the 'Type of Notarization' dropdown, the 'Submit to Queue' button, and the 'Add Clients / Notary' step in the navigation bar.

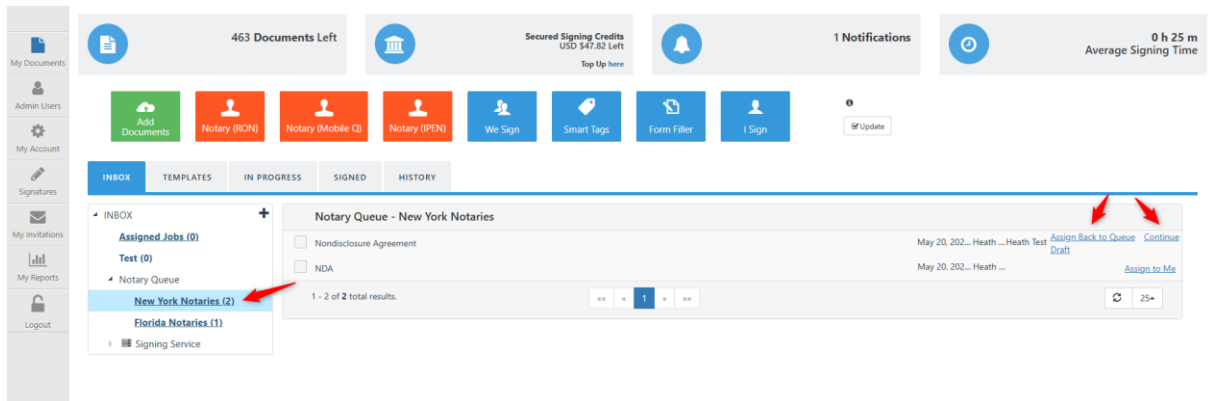
## Assign Documents in a Queue to You

### Internal Queue

Once a document/package has been added to an internal notary queue, users in that queue can take the document/package by going to the queue folder under the **Notary Queue** tab in **My Documents > Inbox**, then clicking 'Assign to Me'. Once they have assigned the document to themselves, they will be taken to the RON/IPEN wizard to complete document prep before going to document tagging and finally sending the document/package for signing and notarization.

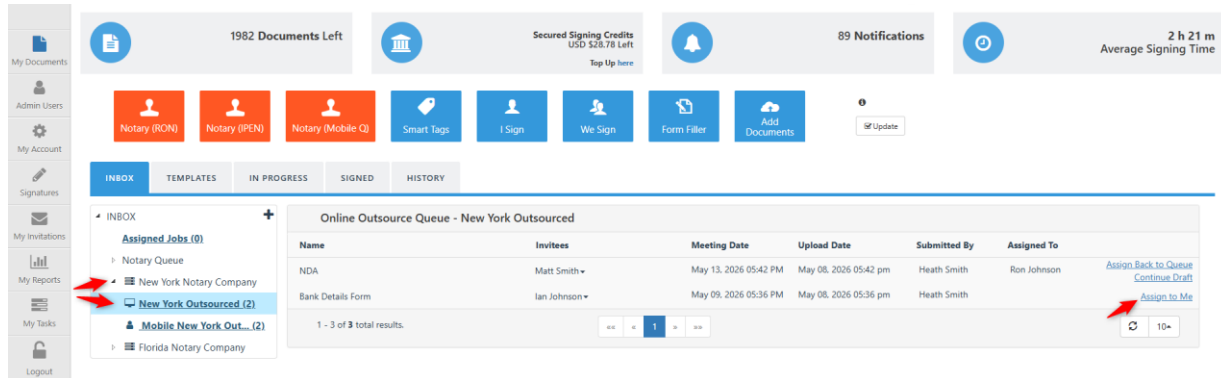


If the notary decides they no longer want to handle notarization for a document/package before sending, they can go to the notary queue and assign the document back to the queue by clicking 'Assign Back to Queue'. Or, if they don't immediately send the document/package after assigning it to themselves, they can go to the queue again later and click 'Continue Draft' to continue prep and tagging before sending.

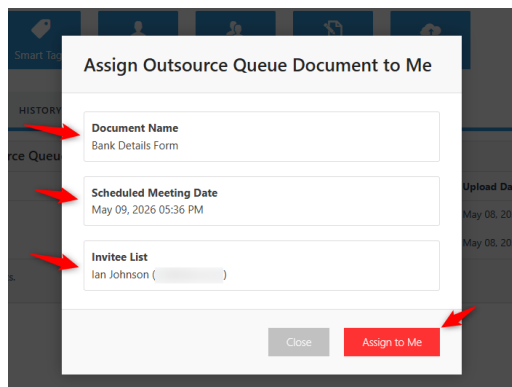


### Outsource Queue

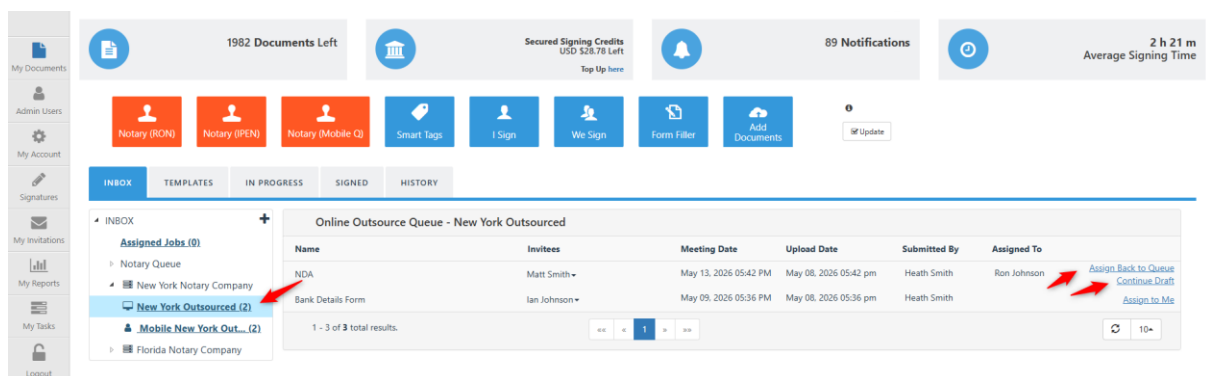
Once a document/package has been added to an outsource notary queue, users in the company assigned to that queue can take the document/package by going to the outsource queue folder under that notary company’s tab in **My Documents > Inbox**, then clicking ‘Assign to Me’. Once they have assigned the document to themselves, they will be taken to the RON/IPEN wizard to complete document prep before going to document tagging and finally sending the document/package for signing and notarization.



After clicking ‘Assign to Me’, a confirmation pop-up will display containing additional details about the notary process, including the document name, the scheduled meeting date, and the invitee list. Click ‘Assign to Me’ in this pop-up to confirm.



If the notary decides they no longer want to handle notarization for a document/package before sending, they can go to the notary queue and assign the document back to the queue by clicking ‘Assign Back to Queue’. Or, if they don’t immediately send the document/package after assigning it to themselves, they can go to the queue again later and click ‘Continue Draft’ to continue prep and tagging before sending.



## Queue Document Management

Admin users in a Secured Signing account have full visibility and control of documents in notary queues. To start managing documents in notary queues:

1. Go to **Admin Users > My Notary Queue**.
2. Optionally, select a notary to only see documents assigned to that notary.
3. Optionally, select a notary queue to only see documents in that queue.

Admin users can see the status and view the document logs of specific documents and packages in notary queues and can delete the documents if necessary.

Document Owner	Document Name	Date Created	Last Sign Date	Status	Notary Queue	Assigned To	Actions
Heath Smith	Nondisclosure Agreement	May 20, 2026 09:39 am	Not Signed Yet	Draft	New York Notaries	Ian Johnson	[Icons]
Heath Smith	NDA	May 20, 2026 09:27 am	Not Signed Yet	Draft	New York Notaries	Not Assigned	[Icons]

Additionally, for documents in an outsource queue, users in the account that created the outsource queue can track the status of documents in the outsource queue by going to the outsource queue folder under that notary company's tab in **My Documents > Inbox** or **In Progress** or **Signed** (depending on where the document is in the signing process).

Then, the user can see details such as the meeting date and the status of the document, or view the document and check the document log, and much more.

Name	Matter/Ref N...	Invitees	Start Date	Meeting Date	Due Date	Status	Last Signed	Actions
Bank Details F...		Ian Johnson	May 08, 2026 06:34 pm	May 12, 2026 06:25 PM	May 15, 2026 06:27 pm	Meeting Scheduled	Not Signed	[Icons]

# We Sign

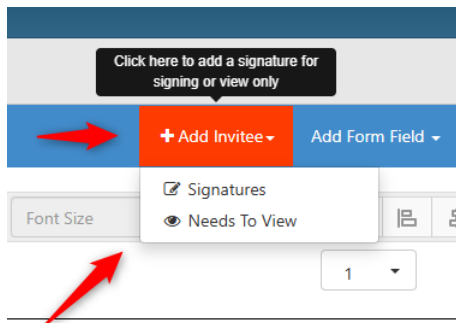
## Overview

In We Sign, you can upload a single document or create a package of documents, add invitee signatures and form fields, then send the document(s) out to be signed.

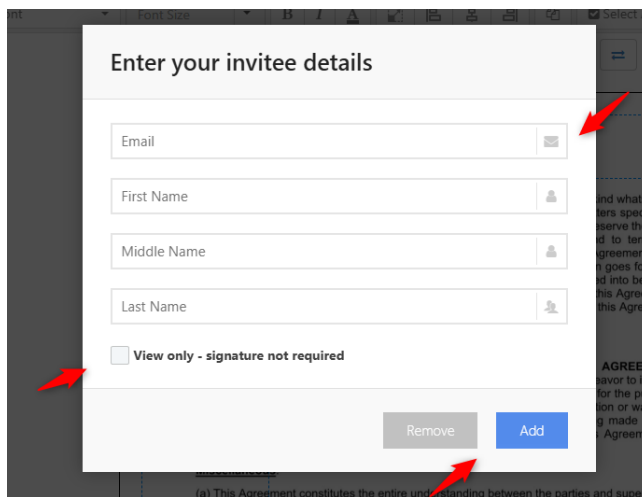
## Designer

### Add Invitee

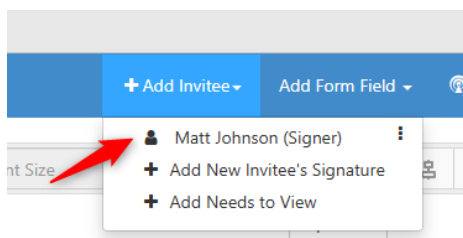
To add a new invitee to the document, select 'Signatures' in the **Add Invitee** dropdown menu. If the invitee only needs to view the document, and doesn't need to sign, select 'Needs To View' instead (if you don't see this option, enable 'Signer Needs to View – No Signature' in **My Account > My Settings**).



A pop-up will display to enter invitee details. Enter the invitee's email and name, then click 'Add' to add them to the document. You can also click 'Remove' to cancel, and you can also check 'View only' here if the invitee only needs to view the document and not sign.

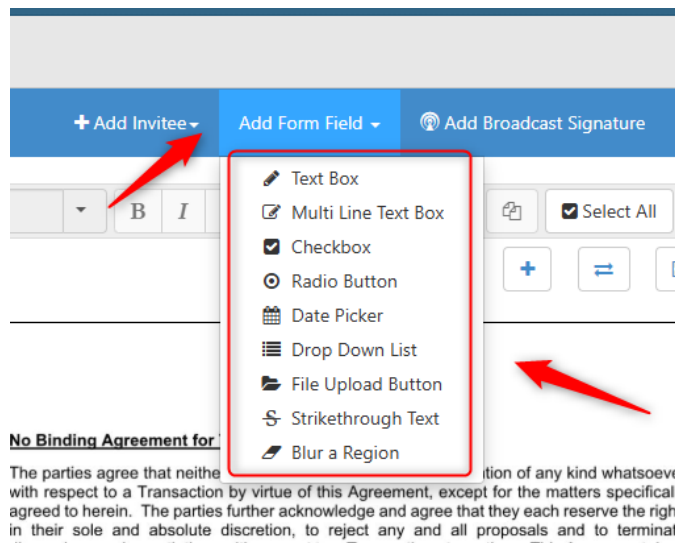


If you need to add another signature for an existing invitee, you can select the invitee from the 'Add Invitee' dropdown menu.

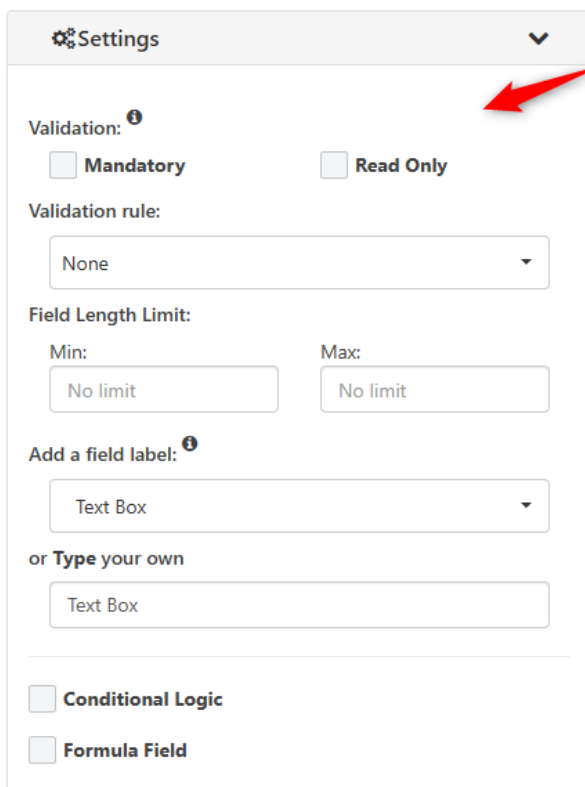


### Add Form Fields

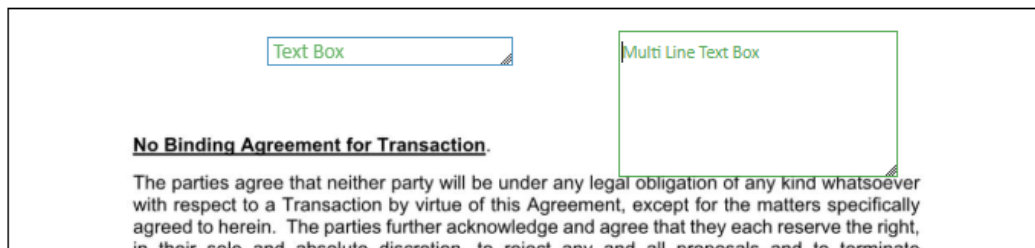
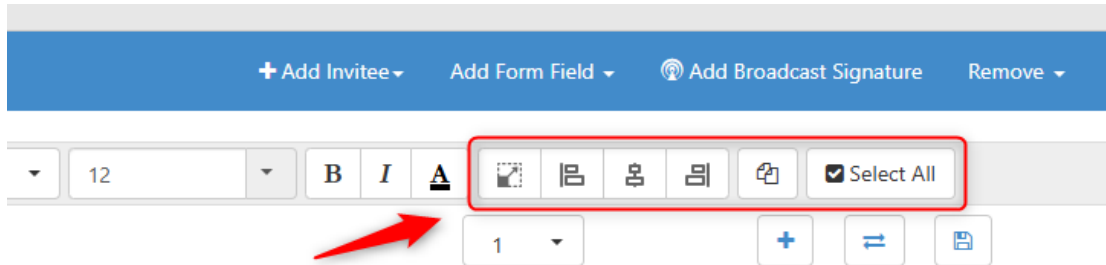
From the **Add Form Field** dropdown menu, you can click to add the form fields you need the invitee(s) to fill before signing.



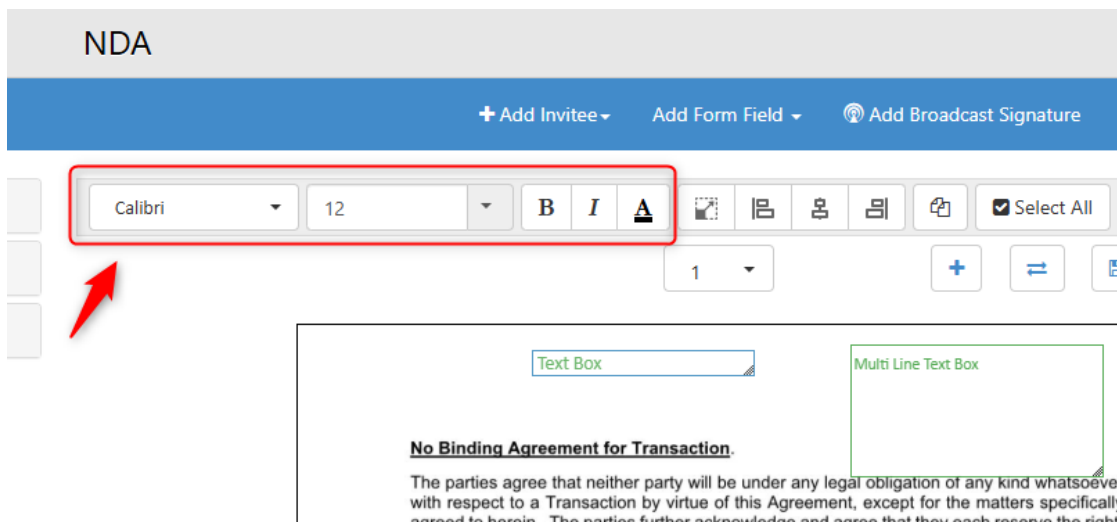
Once you have added a form field, you can change settings in the 'Settings' section on the left side of the page. Most fields will have different settings, but they all have the **Mandatory** option, which if enabled means the invitee must enter input into that field before they can sign. Most fields have the **Read Only** option to, which if enabled blocks the invitee from entering input into the field, they can only see the existing input. You can also change the **Field Label** for most fields, which changes the placeholder text in a field before a value is entered, and differentiates multiple of the same fields.



There are some more advanced controls for form fields in the control bar above the document. You can click a form field to select it, then click **Duplicate selected field** to duplicate it. For the other controls, you must first select 2 or more fields, you can do so by holding the **Ctrl** key on Windows or the **Command** key on Mac and clicking all the fields you would like to select or click **Select All** to select all fields on the document. Then you can use the controls to make all selected fields the same size as the first field you selected or align the fields with the first field you selected.

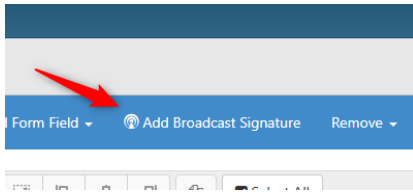


Finally, for fields that contain text like text boxes and multi-line text boxes, there are formatting controls in the control bar above the page to change font, font size, and font colour, and to make text bold or italic.

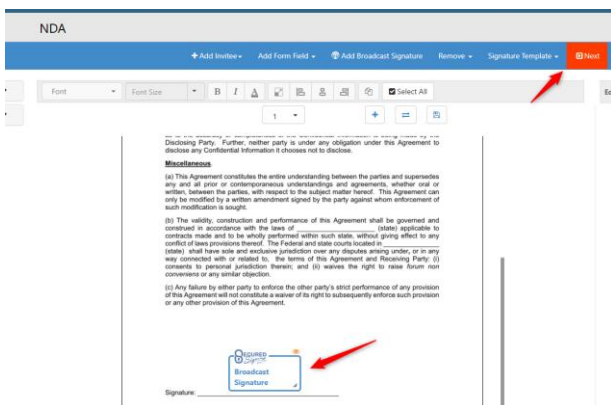


### Add Broadcast Signature

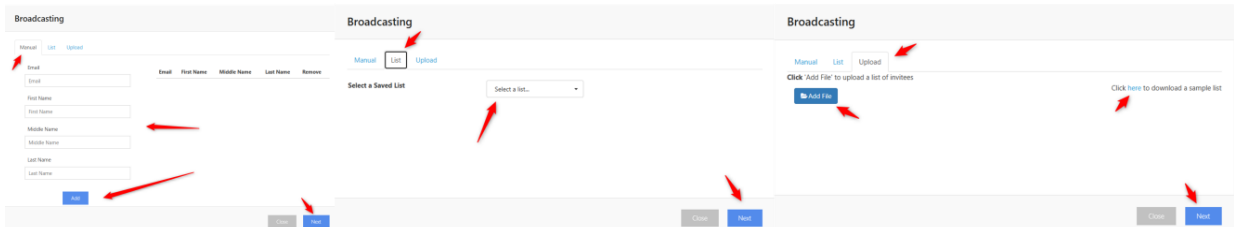
If you need to send the same document to multiple different invitees at once, instead of tagging and sending the document multiple times, you can add a broadcast signing by clicking **Add Broadcast Signature**.



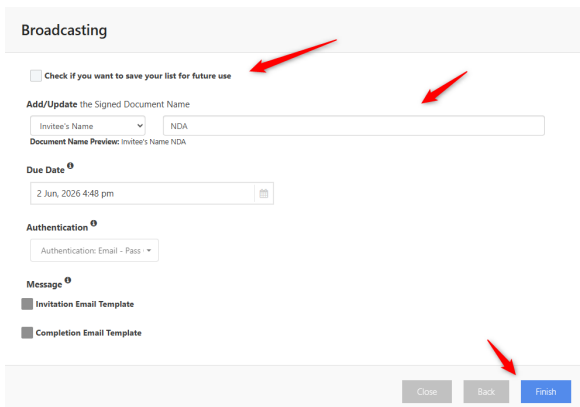
Simply place the broadcast signature(s) as needed, then when you are done tagging the document click **Next**.



Then you will be able to manually add each invitee, select a previously saved list of invitees if you have used broadcast signatures before, or upload a spreadsheet containing the details of each invitee. You can download a sample list to see the format required.

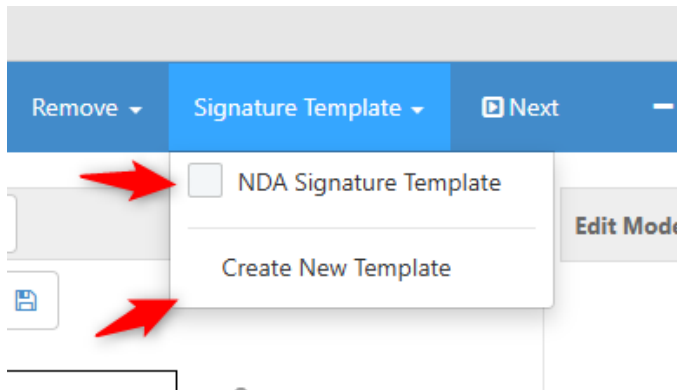


In the next page of the pop-up you can check to save your list for future use and edit some additional options i.e. signed document name and due date, before sending the document to the selected invitees.



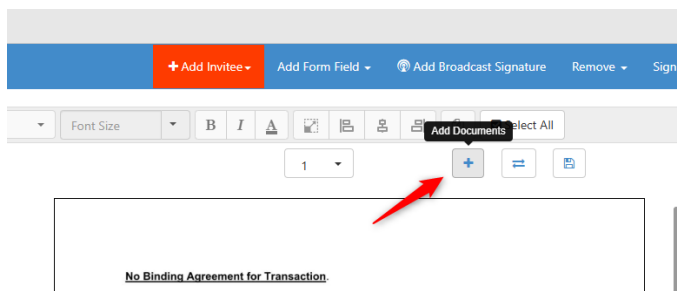
### Signature Template

Select one of your saved signature templates to instantly apply the fields and signatures to the document or click **Create New Template** to create a new one. Signature templates are discussed [here](#) in the user guide.

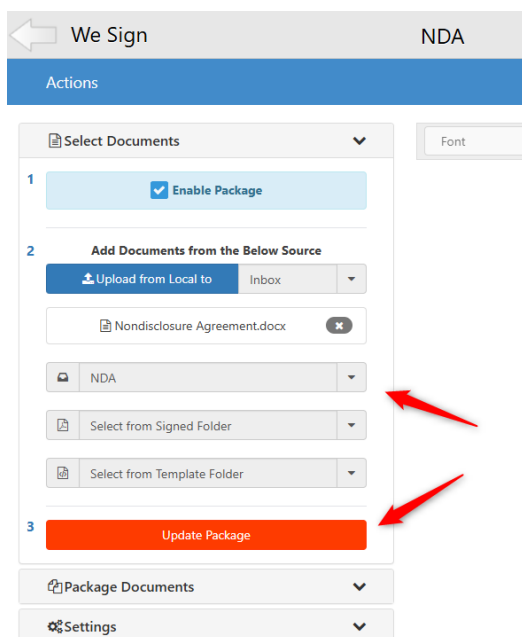


### Add Documents

You can add documents to a package/to create a package in the We Sign designer by first clicking the **Add Documents** button.

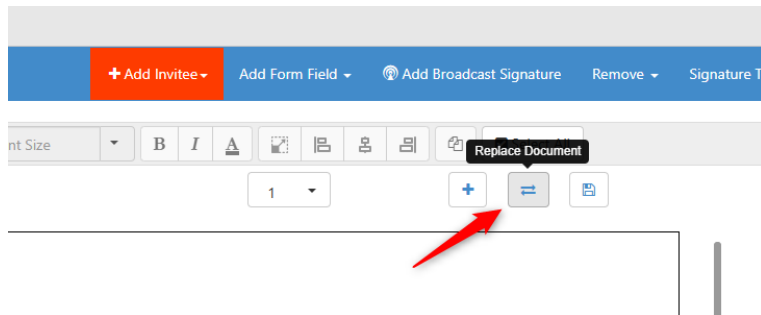


Then in the 'Select Documents' panel on the left side of the page, you can either upload a new document, select a document from the inbox or signed documents folder, or select a saved template. Finally, to add the selected document, click **Update Package**.

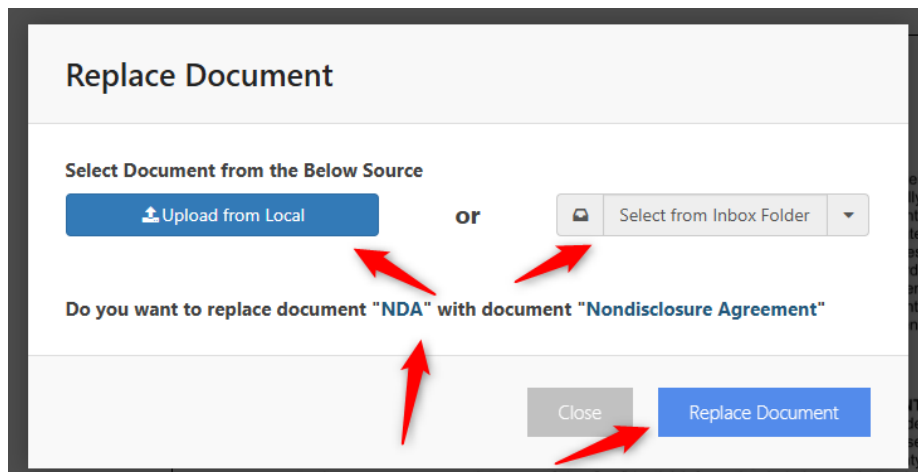


### Replace Document

If you have already started tagging your document in the We Sign designer, but you need to replace the document with another document without losing the form fields and signatures on the document, click the **Replace Document** button.

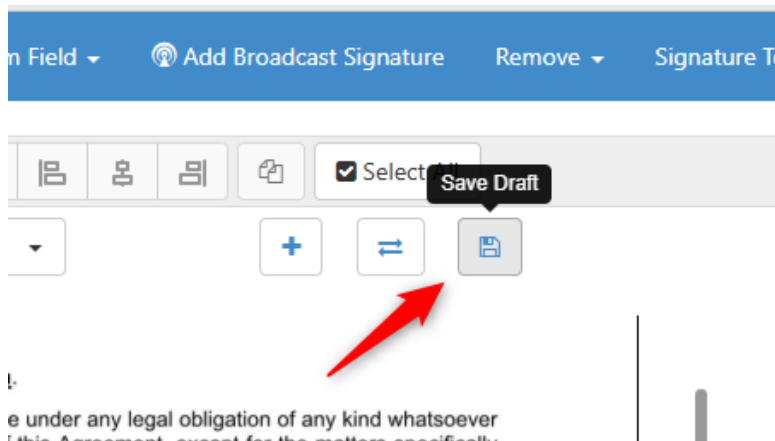


Then, in the pop-up that displays, upload a document or select a document from your inbox to replace the current document with. Please note that you cannot replace the current document with a document that has less pages if it will result in fields or signatures being removed i.e. if the current document has a field on page 5, you can't replace it with a 4-page document.

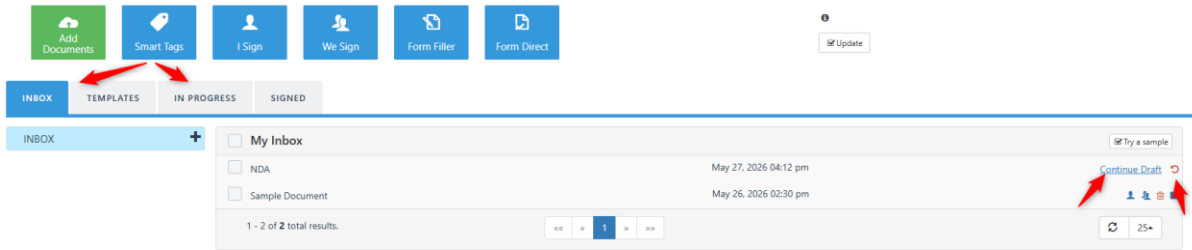


### Save Draft

To save a draft and continue tagging the document later click the **Save Draft** button. A draft will also be auto-saved every 5 minutes.

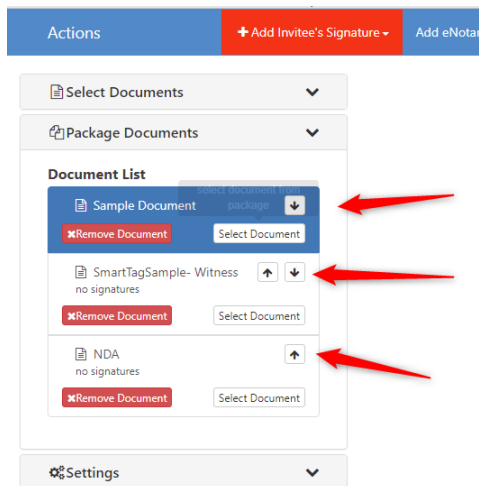


Once a draft has been saved it will appear in the **Inbox** and in the **In Progress** tab. You can click **Continue Draft** to open the document in We Sign and continue tagging or **Remove document draft** to remove all fields and signatures from the document and delete the draft.



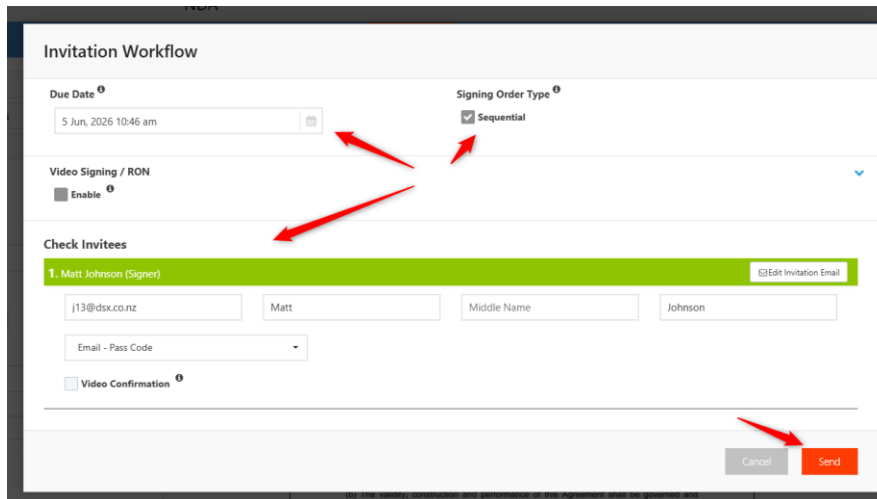
### Document Order in a Package

To change the order that documents in a package will be signed in, open the **Package Documents** dropdown and use the up and down arrows to move document position in the in the **Document List**. The document at the top will be signed first.

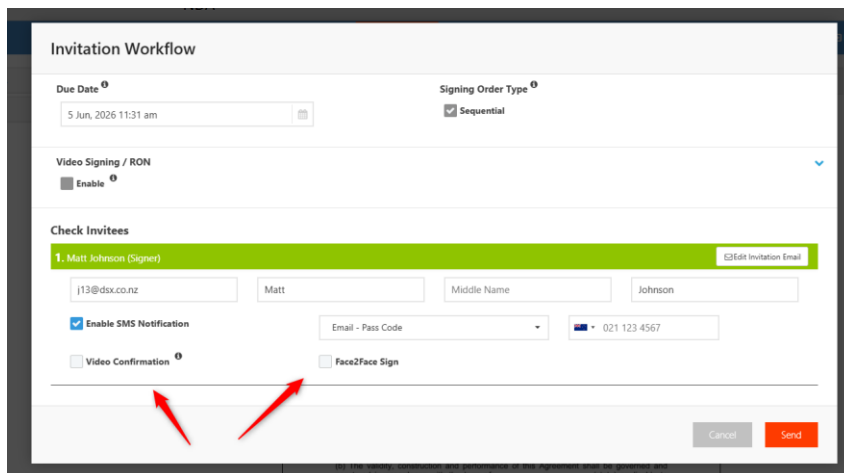


## Invitation Workflow

Once you have finished tagging your document in the We Sign designer, clicking **Next** will open the **Invitation Workflow** pop-up. This is where you can configure your desired workflow for the signing process by changing the signing due date, checking/changing invitee details, and selecting invitees' authentication method before sending the document(s) for signing. You can also enable **Sequential** under 'Signing Order Type', which means the invitees must sign in order, which you can change by clicking and dragging the green bar for each invitee. Note that if your document has form fields, sequential signing order can't be disabled.



Your invitation workflow may look different, as some additional features that you have enabled in your account settings will also display here for you to enable for your signing process. These include features that can be enabled for individual signers like **Video Confirmation**, **SMS Notification** and **Face2Face Signing**.



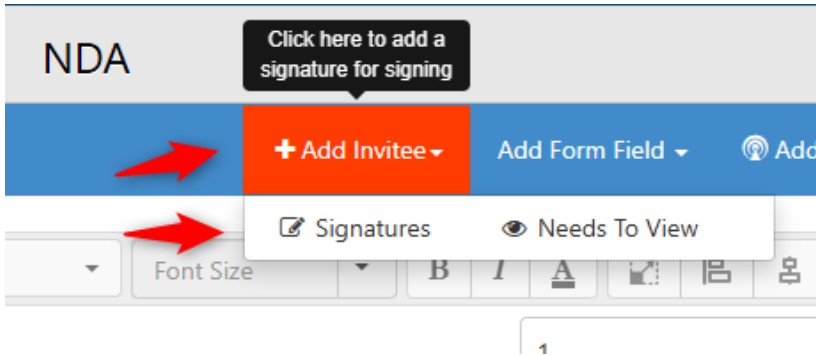
Once you click **Send** in the invitation workflow, either the first invitee will receive an invitation email if **Sequential** is enabled, or all invitees will receive their invitation email at once if it is disabled.

# Form Filler

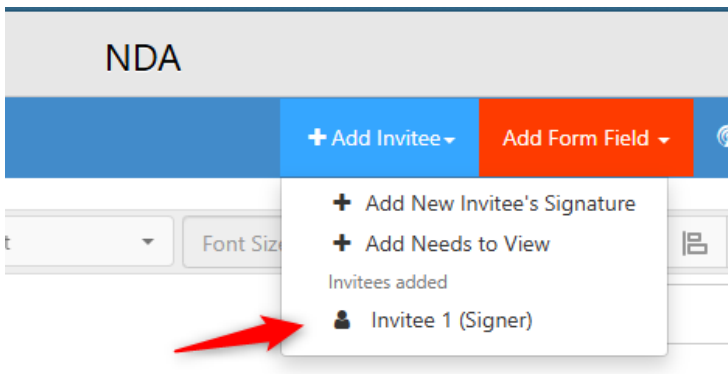
## Template Designer

### Add Invitee

To add a new invitee to the template, select 'Signatures' in the **Add Invitee** dropdown menu. If the invitee only needs to view the document, and doesn't need to sign, select 'Needs To View' instead (if you don't see this option, enable 'Signer Needs to View – No Signature' in **My Account > My Settings**).

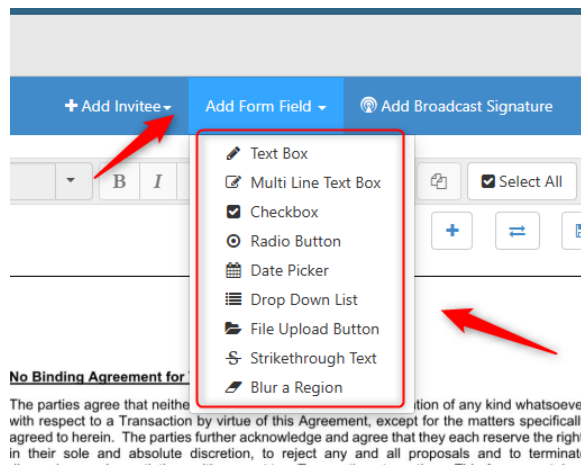


If you need to add another signature for an existing invitee, you can select the invitee from the 'Add Invitee' dropdown menu.



## Add Form Fields

From the **Add Form Field** dropdown menu, you can click to add the form fields you need the invitee(s) to fill before signing.



Once you have added a form field, you can change settings in the ‘Settings’ section on the left side of the page. Different fields will have different settings, but here are some settings that most fields have:

- All fields have the **Mandatory to Fill-in By Invitee** option, which if enabled means the invitee must enter input into that field before they can sign.
- Most fields have the **Required to Fill-in By Sender** option, which if enabled means the sender will be able to enter input when sending the template for signing.
- Most fields also have the **Read Only** option to, which if enabled blocks the invitee from entering input into the field, they can only see the existing input.
- You can also change the **Field Label** for most fields, which changes the placeholder text in a field before a value is entered, and differentiates multiple of the same fields.

**Settings** ⚙️

**Validation:** ⓘ

**Mandatory to Fill-in By Invitee 1**

**Required to Fill-in By Sender**

**Read Only**

**Validation rule:**

None ▾

**Field Length Limit:**

Min:  Max:

**Add a field label:** ⓘ

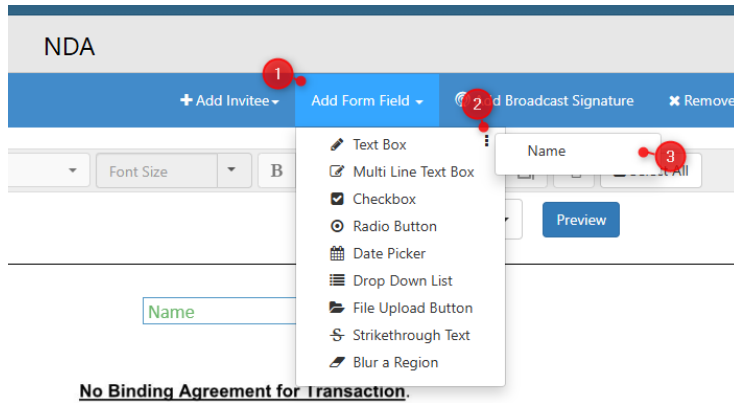
Text Box ▾

or **Type your own**

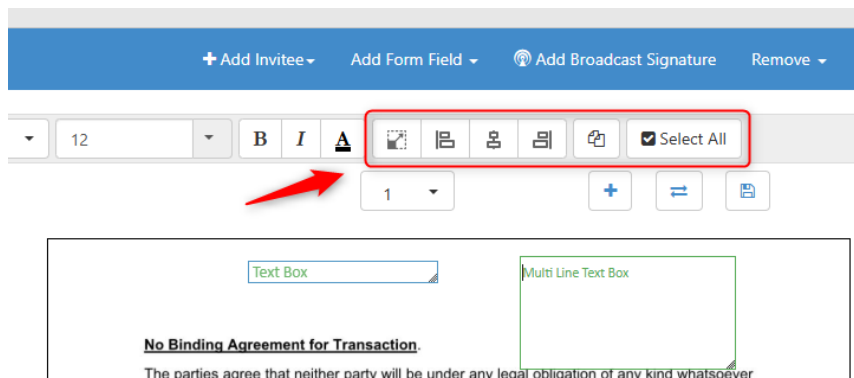
**Conditional Logic**

**Formula Field**

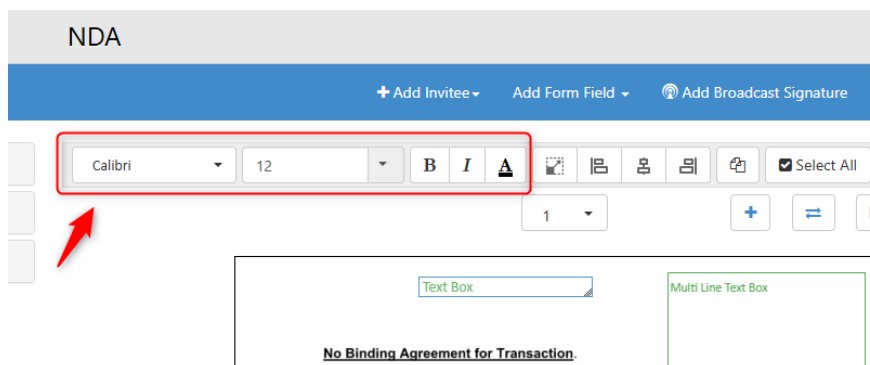
If you need the same fields duplicated in different places in one form, you can copy fields such as text boxes, multi-line text boxes, checkboxes, date pickers and drop-down lists by clicking the 3 dots and then the field you'd like to copy in the **Add Form Field** dropdown. Once the invitee has filled-in the first field when signing, the same value will appear in all fields with the same field label.



There are some more advanced controls for form fields in the control bar above the document. You can click a form field to select it, then click **Duplicate selected field** to duplicate it. For the other controls, you must first select 2 or more fields, you can do so by holding the **Ctrl** key on Windows or the **Command** key on Mac and clicking all the fields you would like to select or click **Select All** to select all fields on the document. Then you can use the controls to make all selected fields the same size as the first field you selected or align the fields with the first field you selected.



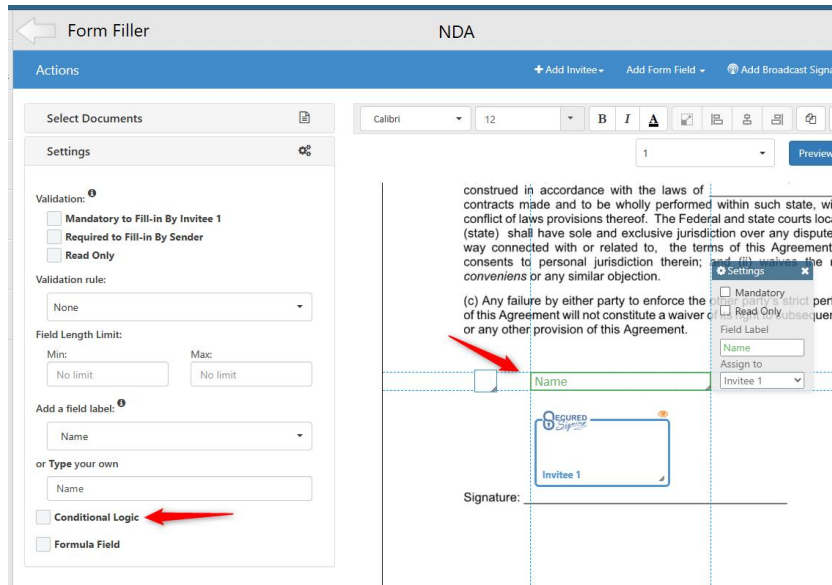
Finally, for fields that contain text like text boxes and multi-line text boxes, there are formatting controls in the control bar above the page to change font, font size, and font colour, and to make text bold or italic.



### Conditional Logic

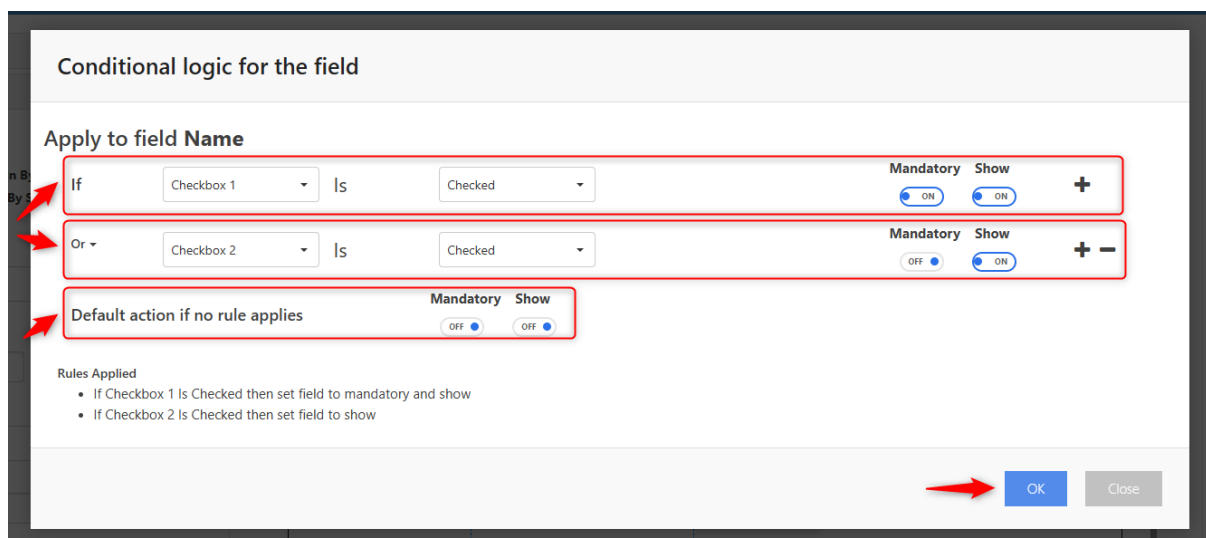
With Conditional Logic for form fields, users can create templates that adapt to the invitee’s responses, showing or hiding relevant and applicable information.

To enable Conditional Logic for a field, first select a field, then check **Conditional Logic** in the ‘Settings’ section on the left side of the page.



In the pop-up that displays, create the rules for your field using up to 5 conditions. You can show or hide the field or make it mandatory or non-mandatory based on whether certain conditions have been met in other fields on the template. The default rule decides if the field will show and if it will be mandatory if none of the conditions are fulfilled. Once you have created the rules, click **OK** to save the conditional logic for the field.

In the below example, the field will show and be mandatory if ‘Checkbox 1’ is checked, or if ‘Checkbox’ 2 is checked, it will show but won’t be mandatory.

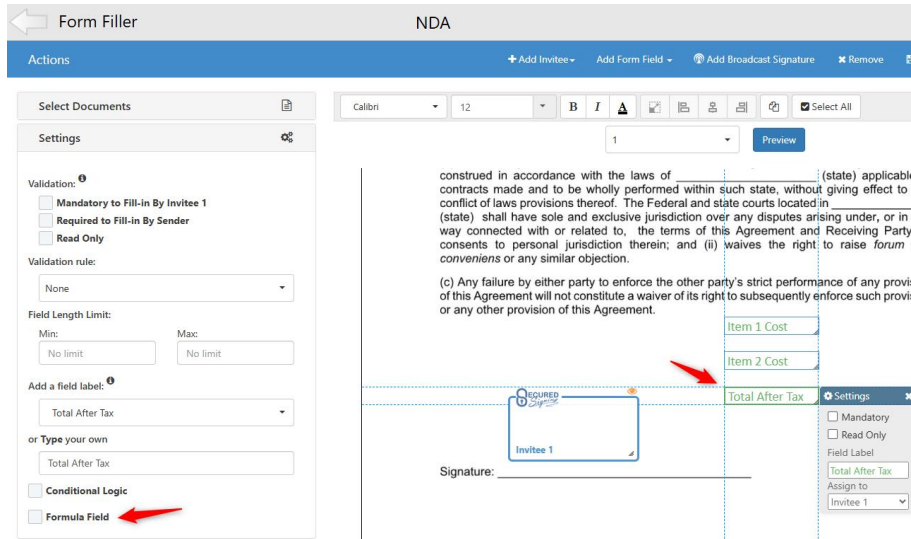


You can click **Preview** in the template designer to try out any conditional logic you have setup.

### Formula Fields

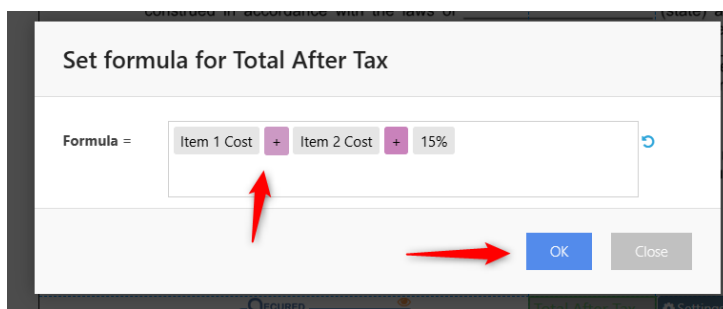
Formula Fields offers complex calculations and decision-making rules that automate the signing process, reducing errors and improving accuracy.

To enable Formula Field for a field, first select a text box field, then check **Formula Field** in the ‘Settings’ section on the left side of the page.



In the pop-up that displays, you can create the formula that will calculate the value that will display in the field. You can use the value entered in any other text box field with the **Numeric Only** validation rule set, then add to it, subtract from it, multiply it by, or divide it by any number, or by the number entered in another **Numeric Only** text box field. You can also add '[Tax]' to the formula to add a percentage of the sum.

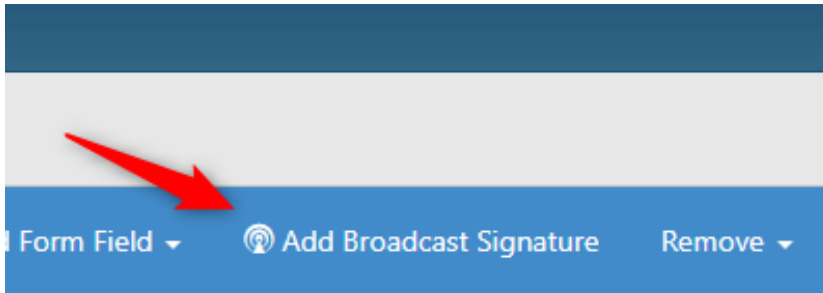
The below formula field takes the values entered in 2 other fields in the template, adds them together, adds a tax of 15%, then shows the total.



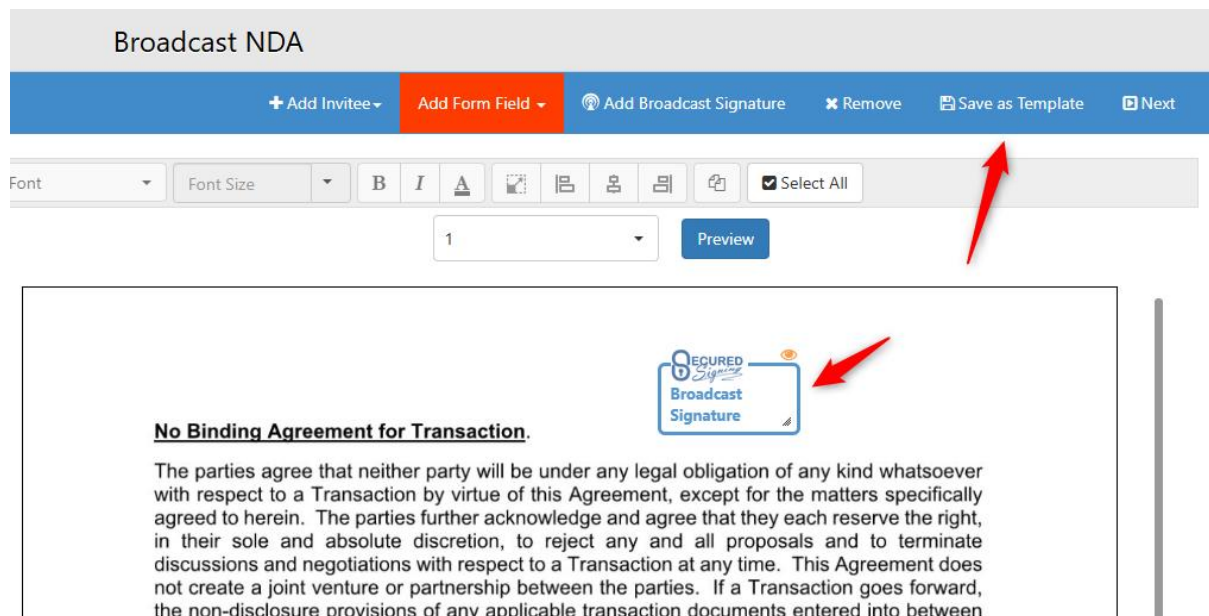
You can click **Preview** in the template designer to try out any formula you have setup.

### Add Broadcast Signature

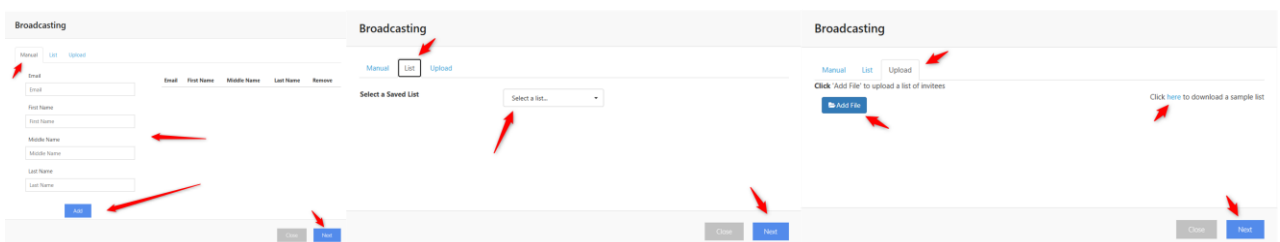
If you need to send the same template to multiple different invitees at once, instead of sending the template multiple times, you can add a broadcast signing by clicking **Add Broadcast Signature**.



Simply place the broadcast signature(s) as needed, then when you are done tagging the document, save the template.



Then when you select the template and click **Send** in the 'Templates' tab you will be able to manually add each invitee, select a previously saved list of invitees if you have used broadcast signatures before, or upload a spreadsheet containing the details of each invitee. You can download a sample list to see the format required.



In the next page of the pop-up you can check to save your list for future use and edit some additional options i.e. signed document name and due date, before sending the document to the selected invitees.

**Broadcasting**

Check if you want to save your list for future use

Add/Update the Signed Document Name

Invitee's Name: [dropdown] NDA  
Document Name Preview: Invitee's Name NDA

Due Date: 2 Jun, 2026 4:48 pm

Authentication: Email - Pass

Message: Invitation Email Template, Completion Email Template

Buttons: Close, Back, Finish

### Preview Template

Once you have added your fields and signatures to your template, you can click the **Preview** button to see what it will look like from the signers' perspective when filling and signing. You can also click **View PDF Version** to see what the document will look like when it is signed, with any form field input you have entered.

+ Add Invitee + Add Form Field + Add Broadcast Signature + Remove

1 [dropdown] Preview

Preview

View PDF Version Close

contracts made and to be wholly performed within such state, without giving effect to any conflict of laws provisions thereof. The Federal and state courts located in \_\_\_\_\_ (state) shall have sole and exclusive jurisdiction over any disputes arising under, or in any way connected with or related to, the terms of this Agreement and Recalling Party: (i) consents to personal jurisdiction therein; and (ii) waives the right to raise forum non conveniens or any similar objection.

(c) Any failure by either party to enforce the other party's strict performance of any provision of this Agreement will not constitute a waiver of its right to subsequently enforce such provision or any other provision of this Agreement.

Next

Name: [input field]

Signature: [input field with "Click to Sign" button]

Document Name: NDA Sign

Preview

Back to Preview Close

contracts made and to be wholly performed within such state, without giving effect to any conflict of laws provisions thereof. The Federal and state courts located in \_\_\_\_\_ (state) shall have sole and exclusive jurisdiction over any disputes arising under, or in any way connected with or related to, the terms of this Agreement and Recalling Party: (i) consents to personal jurisdiction therein; and (ii) waives the right to raise forum non conveniens or any similar objection.

(b) The validity, construction and performance of this Agreement shall be governed and construed in accordance with the laws of \_\_\_\_\_ (state) applicable to contracts made and to be wholly performed within such state, without giving effect to any conflict of laws provisions thereof. The Federal and state courts located in \_\_\_\_\_ (state) shall have sole and exclusive jurisdiction over any disputes arising under, or in any way connected with or related to, the terms of this Agreement and Recalling Party: (i) consents to personal jurisdiction therein; and (ii) waives the right to raise forum non conveniens or any similar objection.

(c) Any failure by either party to enforce the other party's strict performance of any provision of this Agreement will not constitute a waiver of its right to subsequently enforce such provision or any other provision of this Agreement.

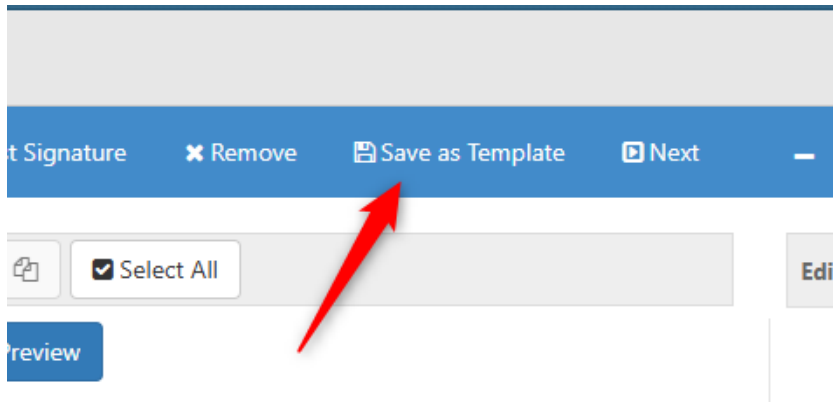
Matt Smith

Signature: \_\_\_\_\_

### Save Template

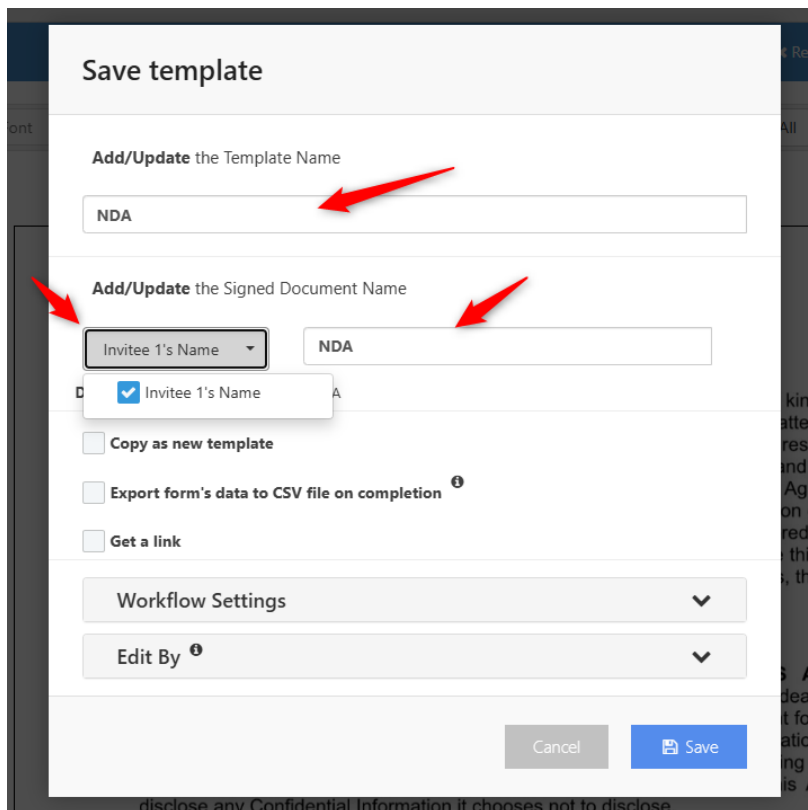
#### Save as Template

When you have a document open in the Form Filler template designer, click the ‘Save as Template’ button to open the ‘Save template’ pop-up.



#### Template Name

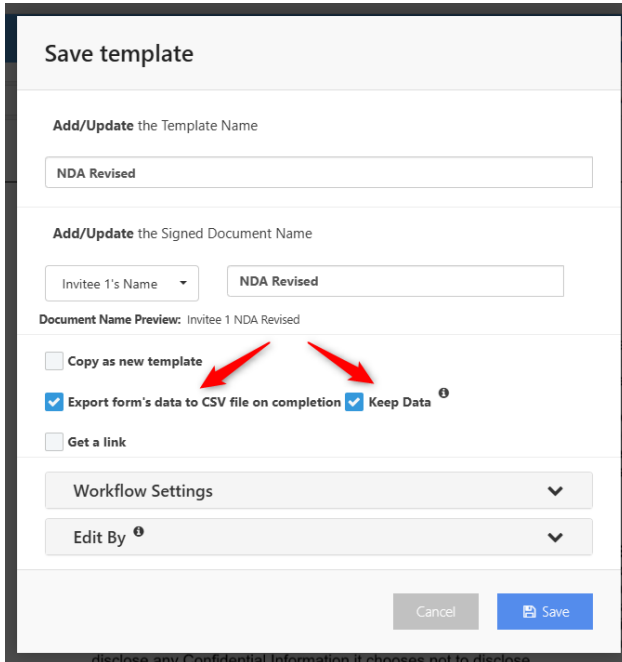
Choose a name for your new template. You can also choose a different name for the signed document whenever you send the template for signing, as well as add any of the invitees' names to the beginning of the signed document name.



### Export Form Data to a CSV

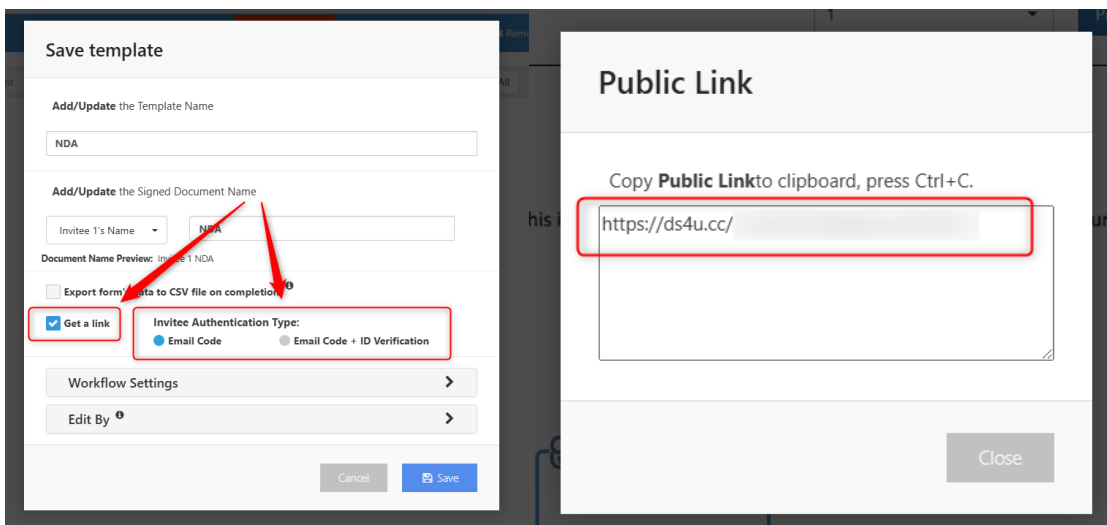
Checking the ‘Export form’s data to CSV file on completion’ will create a CSV file containing the field labels and values entered in all fields each time the template is filled and signed. The CSV file will be attached to the sender’s completion email.

You can also check the ‘Keep Data’ option, which will save the form data every time the template is signed, and display it in the ‘Exported Form Field Data’ report in the ‘My Reports’ page.



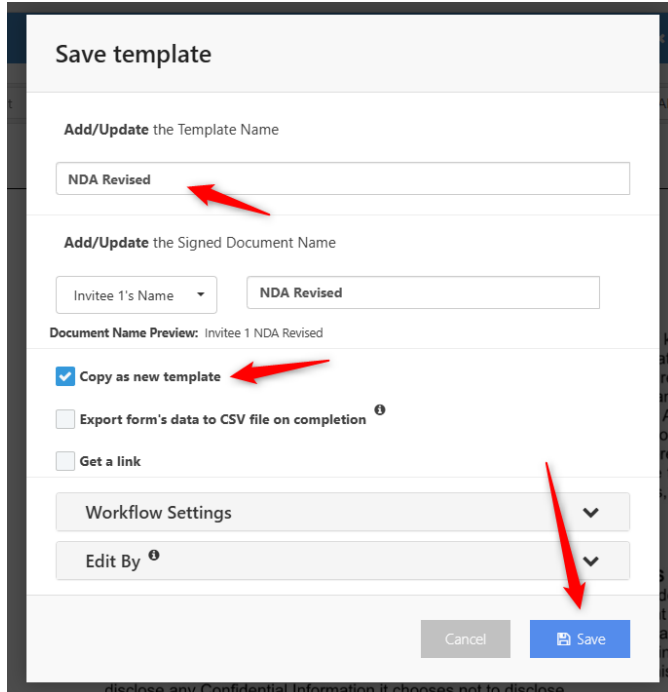
### Get a Link

Create a public form that anyone can sign using a link that we provide to you. Simply enable ‘Get a link’ in the ‘Save template’ pop-up, select ‘Invitee Authentication Type’ (either Email Code or Email Code + ID Verification), then finally click ‘Save’, and you will be given the link that will allow users to sign this template.



### Copy as a New Template

This option only displays when you are editing a template you have already saved. Checking the ‘Copy as new template’ checkbox and clicking **Save** will save the current template with any changes as a new template, without affecting the original template. Make sure you type a new name before saving as a new template.



The screenshot shows a 'Save template' dialog box with the following elements:

- Save template** (Title)
- Add/Update the Template Name** (Section header)
- Input field containing **NDA Revised** (with a red arrow pointing to it)
- Add/Update the Signed Document Name** (Section header)
- Dropdown menu with **Invitee 1's Name** and input field containing **NDA Revised**
- Document Name Preview:** Invitee 1 NDA Revised
- Copy as new template** (with a red arrow pointing to it)
- Export form's data to CSV file on completion**
- Get a link**
- Workflow Settings** (Dropdown menu)
- Edit By** (Dropdown menu)
- Cancel** (Button)
- Save** (Button, highlighted in blue)

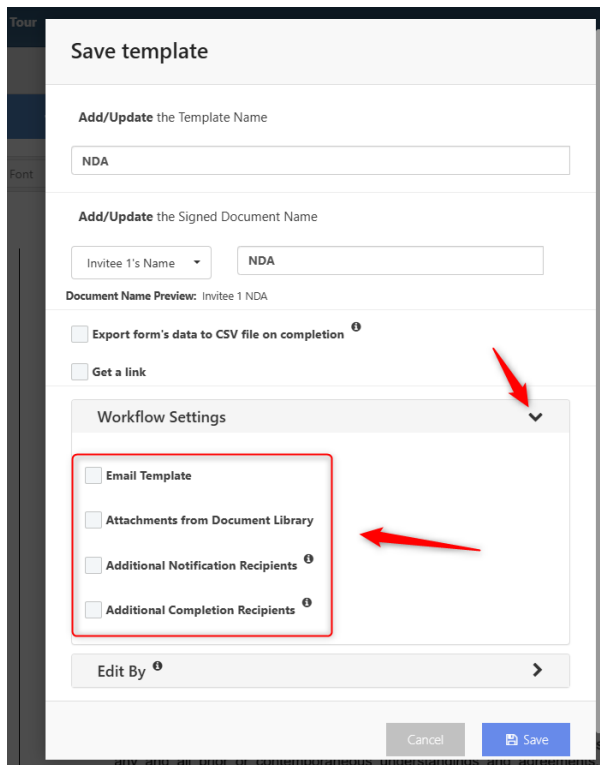
At the bottom of the dialog, there is a small text line: *disclose any Confidential Information it chooses not to disclose.*

## Workflow Settings

For a new template or an existing template, you can choose workflow settings specific to that template that will apply automatically when sending it out for signing.

To start setting up these settings, click to open the **Workflow Settings** dropdown section. Please note that you will first have to enable the features in **My Account > My Settings** to enable them here. These features are:

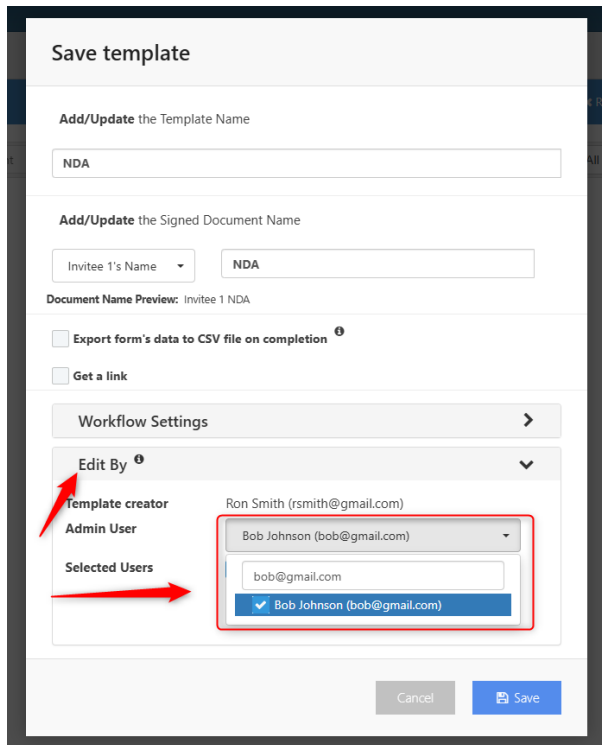
- Email Template – choose a specific invitation and/or completion email template for each invitee in the template.
- Attachments from Document Library – add documents as attachments to the invitation email. These documents can be selected from the document library, which you can add documents to in **My Account > My Settings**.
- Additional Notification Recipients – add additional notification recipients that will receive a notification email whenever their selected invitees receive their invitation to sign the document.
- Additional Completion Recipients – add additional completion recipients that will receive a completion email whenever signing is completed for the document.



The screenshot shows the 'Save template' form. The 'Workflow Settings' section is expanded, showing four options: 'Email Template', 'Attachments from Document Library', 'Additional Notification Recipients', and 'Additional Completion Recipients'. A red box highlights these four options, and a red arrow points to the 'Attachments from Document Library' option. Another red arrow points to the dropdown arrow of the 'Workflow Settings' section. The form also includes fields for 'Add/Update the Template Name' (containing 'NDA') and 'Add/Update the Signed Document Name' (with a dropdown for 'Invitee 1's Name' and a text field containing 'NDA'). There are checkboxes for 'Export form's data to CSV file on completion' and 'Get a link'. At the bottom, there is an 'Edit By' field and 'Cancel' and 'Save' buttons.

### Edit By

Allow other admin users in your account to edit the template. Under the ‘Edit By’ dropdown, search for the admin user(s) you’d like to be able to edit the template by email, select the user(s), then finally save the template by clicking ‘Save’.



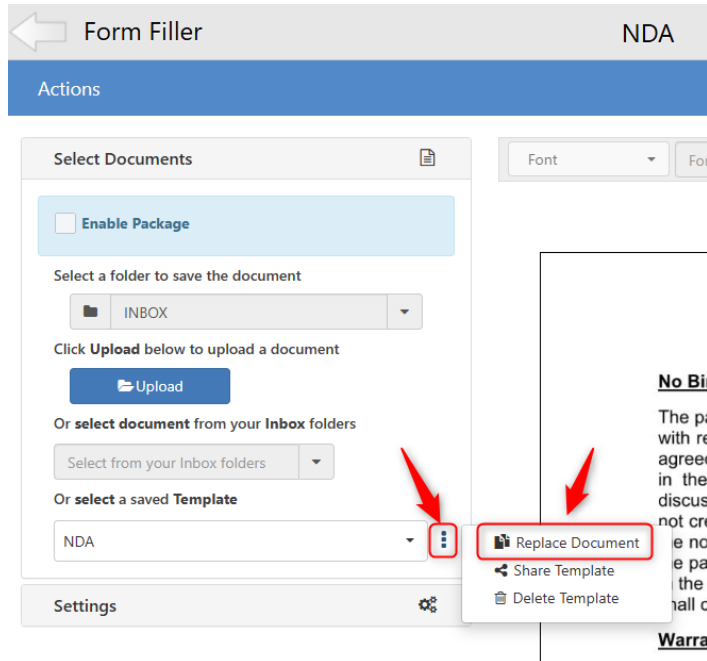
The screenshot shows the 'Save template' form with the following fields and options:

- Add/Update the Template Name:** Input field containing 'NDA'.
- Add/Update the Signed Document Name:** Input field containing 'NDA' and a dropdown menu for 'Invitee 1's Name'.
- Document Name Preview:** 'Invitee 1 NDA'.
- Export form's data to CSV file on completion**
- Get a link**
- Workflow Settings** (with a right arrow)
- Edit By** (dropdown menu):
  - Template creator:** Ron Smith (rsmith@gmail.com)
  - Admin User:** Bob Johnson (bob@gmail.com)
  - Selected Users:** bob@gmail.com, Bob Johnson (bob@gmail.com) (checked)

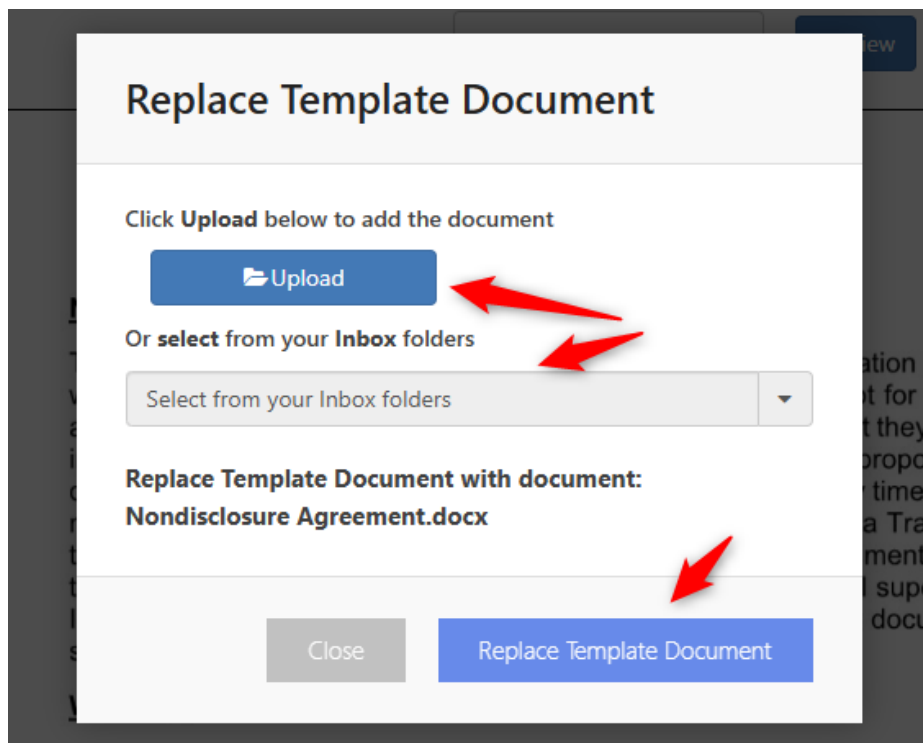
At the bottom of the form are 'Cancel' and 'Save' buttons. Red arrows in the image point to the 'Edit By' dropdown and the 'Selected Users' list.

### Replace Document

If you need to replace the underlying document in the template but you need to keep the fields and signatures you have already added, click the three dots under **Select Documents**, then click **Replace Document**.

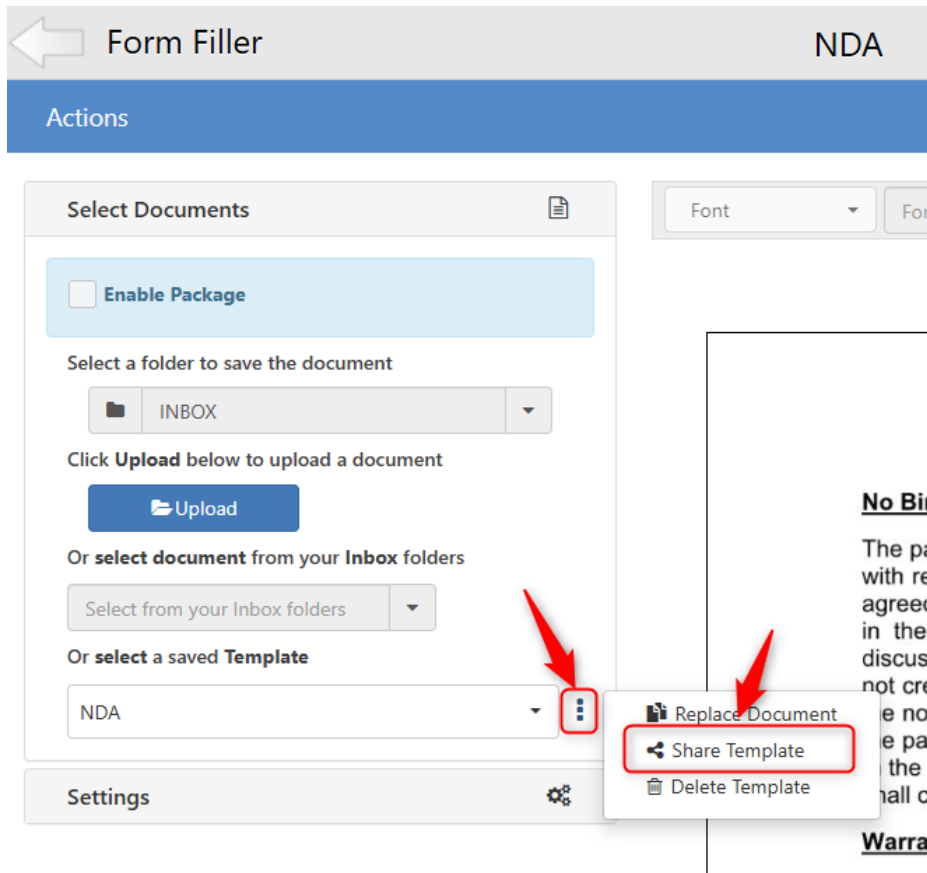


In the 'Replace Template Document' pop-up, click **Upload** to select a new document from your PC, or select a document from your inbox in Secured Signing, then click **Replace Template Document**. The template's document will be replaced, but all your fields and signatures will remain on the template.

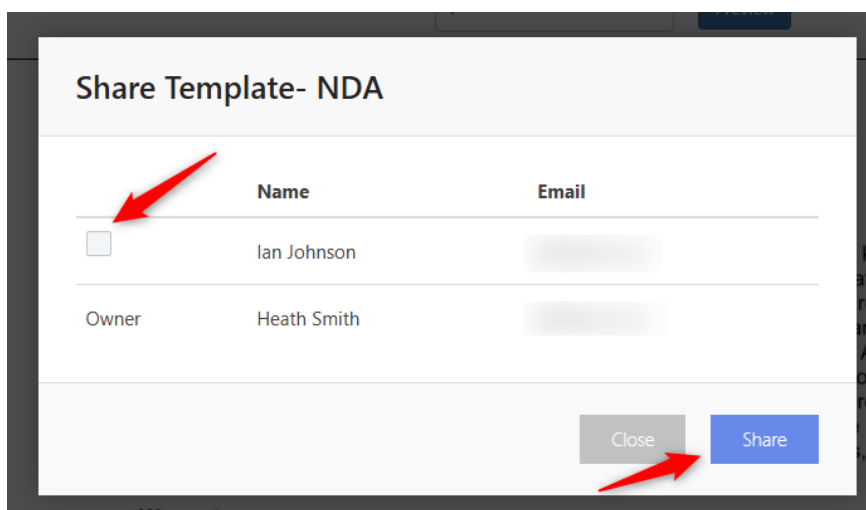


### Share Template

Admin users can share templates with other users in their account. You can share directly from the template designer while editing an existing template by clicking the three dots under **Select Documents**, then clicking **Share Template**.



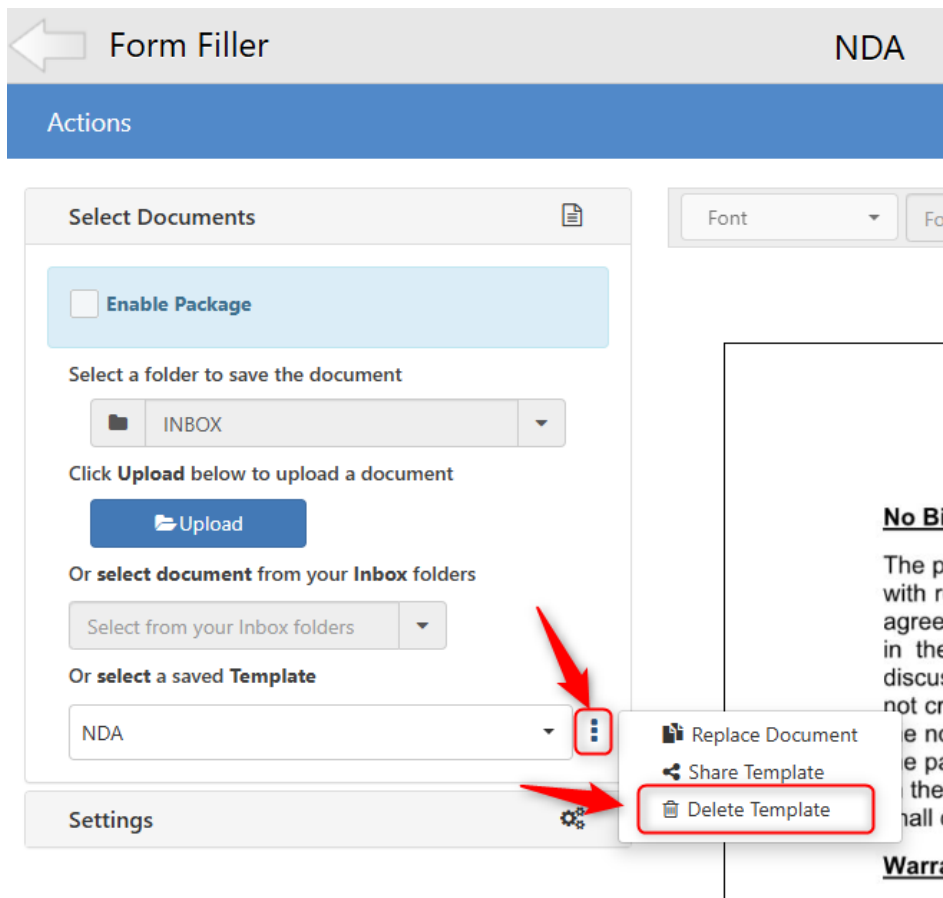
In the 'Share Template' pop-up, select the user you would like to share the template with, then click **Share**.



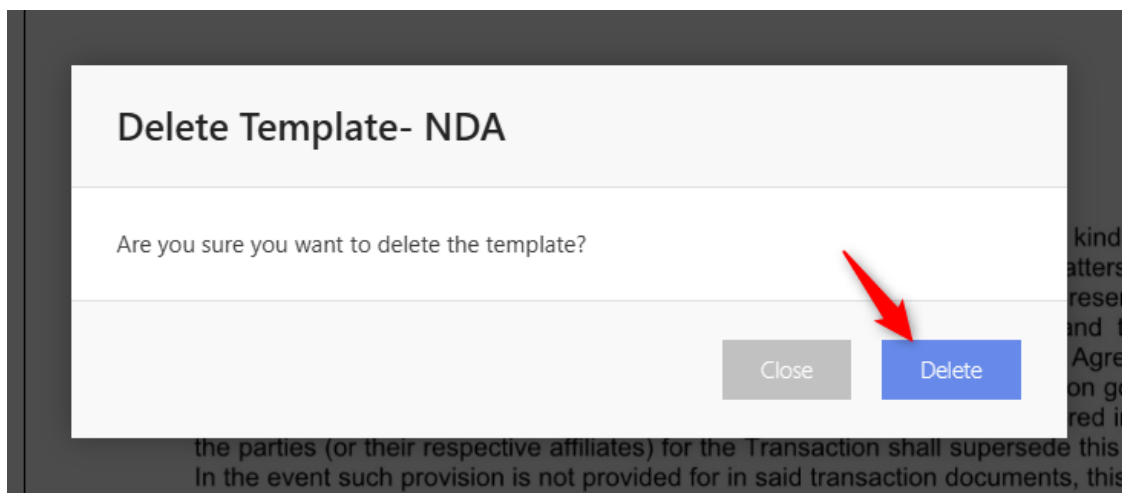
Now the selected user(s) will see the template in the 'Templates' tab in their account and will be able to send it for signing.

### Delete Template

You can delete an existing template while editing it in the Form Filler designer by clicking the three dots under **Select Documents**, then clicking **Delete Template**.



Confirm deletion in the 'Delete Template' pop-up by clicking the **Delete** button.



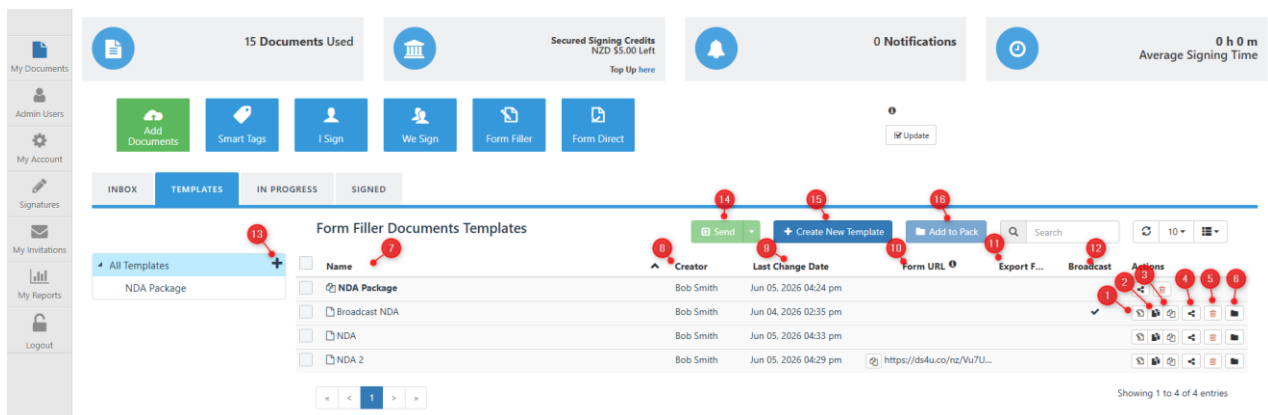
## Template Management

### Overview

In the **Templates** tab in the ‘My Documents’ page, you can manage your templates and send them out for filling and signing.

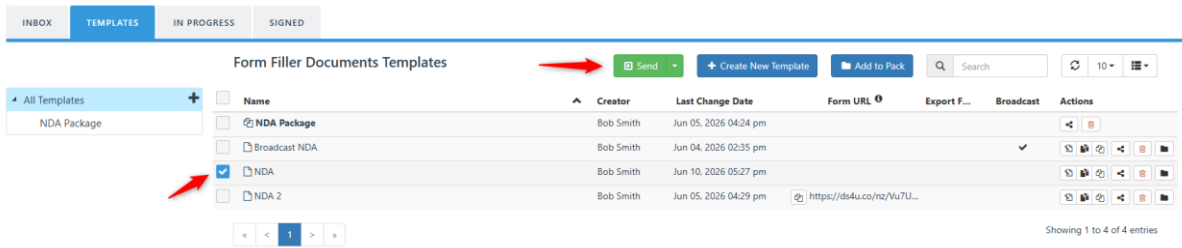
Included in the ‘Templates’ tab is the following:

1. ‘Edit or view your template’ button – open an existing template in the Form Filler template designer.
2. ‘Replace your template document’ button – replace the underlying document in your template while keeping the existing fields and signatures.
3. ‘Copy your template to a new template’ button – a
4. ‘Share your template’ button – with other users in your account- available only for admin user
5. ‘Delete your template’ button - if shared delete for all users
6. ‘Add your template to another pack’ button – Create a pack and add the template to a pack, it also remains as standalone template
7. ‘Name’ column – shows the name of your templates.
8. ‘Creator’ column – shows which user in your account created the template.
9. ‘Last Change Date’ column – shows the last time the template was saved.
10. ‘Form URL’ column – shows and allows you to copy the public link for templates with ‘Get a Link’ enabled.
11. ‘Export Form Data’ column – will show ‘Enabled’ if ‘Export Form Data to a CSV’ is enabled for the template
12. ‘Broadcast’ column – shows a tick if the template has a ‘Broadcast’ signature.
13. ‘Add new Pack’ button – create a new template pack that you can add multiple templates to, allowing you to send those templates together as a package.
14. ‘Send’ button – open the invitation workflow for and send the selected template(s) for signing.
  - a. ‘Preview & Send’ button – displays when clicking the arrow next to ‘Send’, clicking allows you to view the template and make some quick changes before sending for signing.
15. ‘Create New Template’ button – upload a new document or select a document from your inbox to open in the Form Filler template designer and create a new template.
16. ‘Add to Pack’ button – add selected template(s) to an existing pack or create a new pack to add them to.

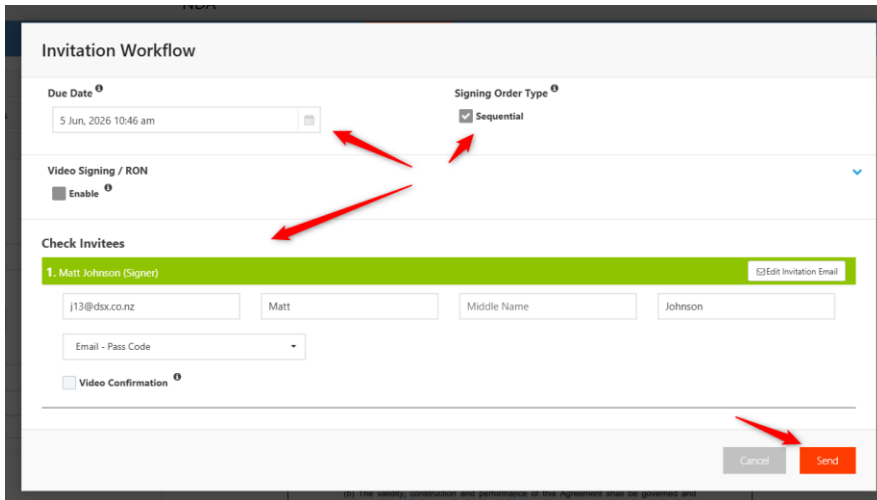


### Send a Template

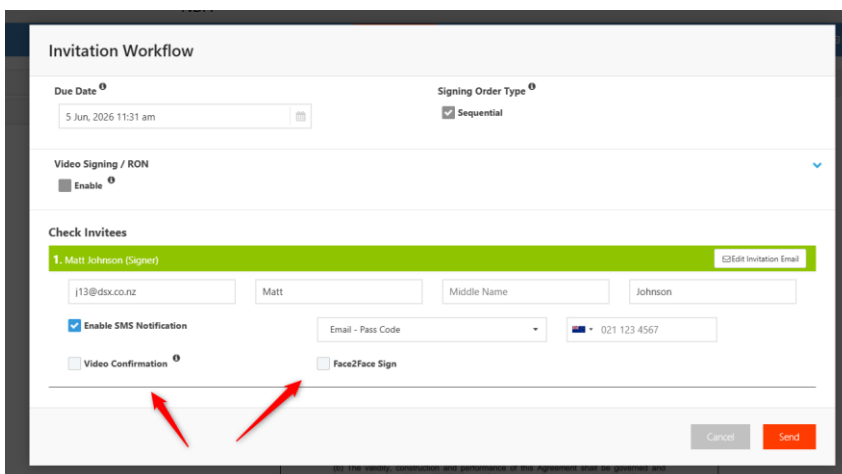
Select a template or multiple templates from the list, then click the **Send** button to open the invitation workflow pop-up.



The invitation workflow is where you can configure your desired workflow for the signing process by changing the signing due date, entering invitee details, and selecting invitees' authentication method before sending the template(s) for signing. You can also enable change the signing order by clicking and dragging the green bar for each invitee **Check Invitee**.



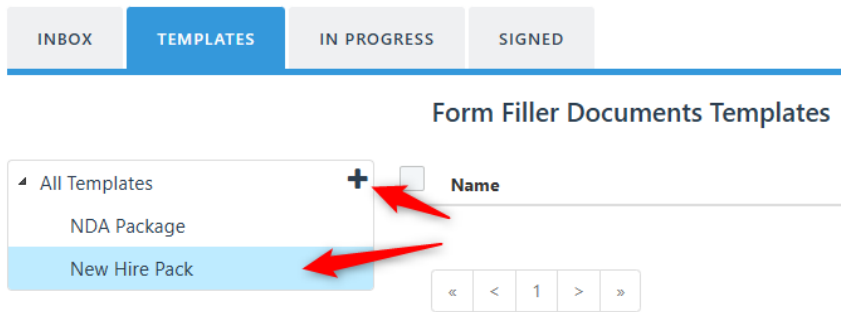
Your invitation workflow may look different, as some additional features that you have enabled in your account settings will also display here for you to enable for your signing process. These include features that can be enabled for individual signers like **Video Confirmation**, **SMS Notification** and **Face2Face Signing**.



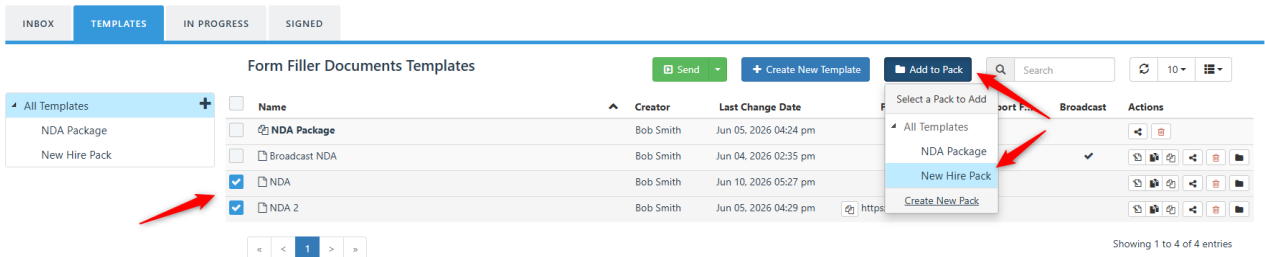
Once you click **Send** in the invitation workflow, the first invitee will receive their invitation email.

### Create and Send a Template Pack

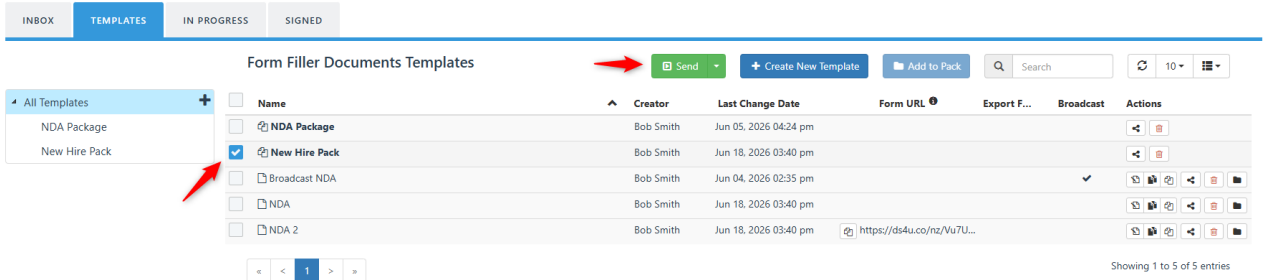
You can create a pack of existing templates that you can send all at once by first clicking the ‘Add new Pack’ button and entering a name for the new pack.



Then select the templates you want to add to the pack, click ‘Add to Pack’, and select the pack you just created.



Now you can select the pack from your template list and click ‘Send’ to open the invitation workflow and send the pack out for signing.



# Smart Tags

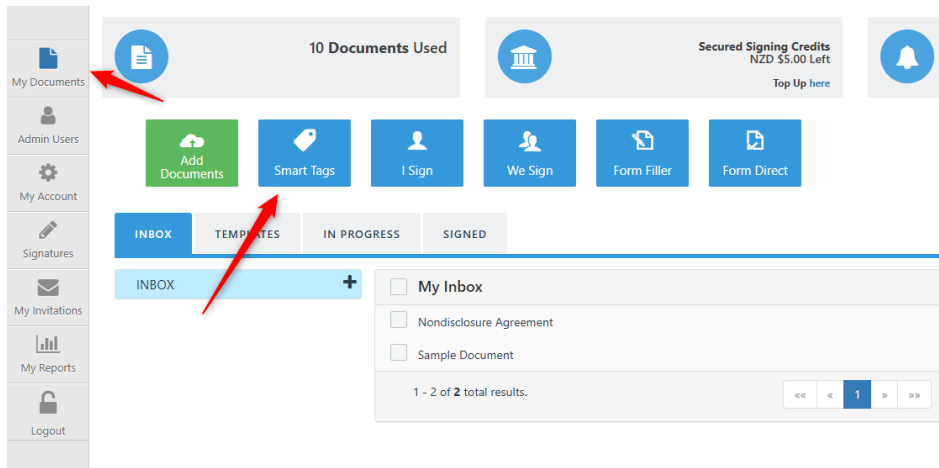
## Overview

Smart Tags allows you to prep a document for use in Secured Signing outside of our system by adding the tags directly into the document, also allowing you to reuse the document multiple times without having to tag it manually each time. Secured Signing’s Smart Tag technology automates document creation and streamlines the invitation and signing process to enhance faster document turnaround and better user experience.

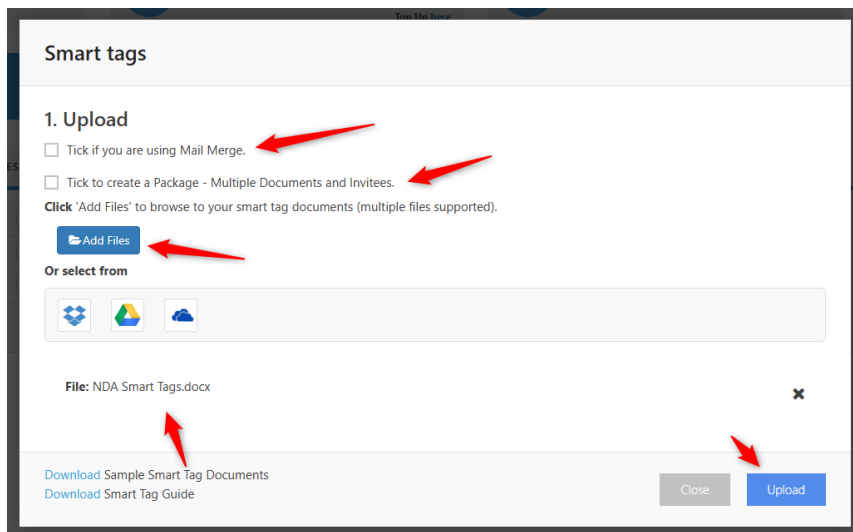
For more information about Smart Tags and how to setup a document with Smart Tags, have a look at our Smart Tag guide at <https://www.securedsigning.com/smart-tag-guide>.

## Upload and Send a Smart Tag Document

After creating a Smart Tag document, you can upload it to Secured Signing by logging you’re your account and going to the **My Documents** page, then clicking the **Smart Tags** button.



This opens the ‘Smart tags’ pop-up where you can upload your Smart Tag document(s) tick if you are using ‘Mail Merge’ in your Smart Tag document(s), and you can tick if you would like to create a package of documents before finally clicking **Upload** to continue to the invitation workflow.



In the Smart Tags invitation workflow, you can check invitee details and additional features that you setup in the Smart Tag document, and you can make changes before sending it out for filling and signing. Click ‘Next’ to continue to the next page.

Smart tags

Please check your invitees and recipients

Enable Video Signing

**NDA Smart Tags.docx**

Invitees:

1 Matt Johnson

[Name Field] Matt MiddleName Johnson

SMS Notification Authentication: Email - Pass Code

Review Before Signing  Video Confirmation

Send Completion Email  Face2Face Sign

2 Nick Smith

[Name Field] Nick MiddleName Smith

SMS Notification Authentication: Email - Pass Code

Review Before Signing  Video Confirmation

Close Back Next

In the next page of the Smart Tags invitation workflow, you can set the signing due date, and which folder you would like to put the document in (by default it will go to the top-level ‘In Progress’ folder). Finally, click ‘Send’ to send the document(s) out for signing, and the invitee(s) will receive their invitation email.

Smart tags

Due Date <sup>?</sup> 5 Jun, 2026 3:51 pm

Save to a Folder <sup>?</sup> IN PROGRESS

Close Back Send

## Form Direct

### Overview

Form Direct allows you to send out common forms based on your country that are pre-tagged. Countries that support Form Direct include New Zealand, Australia, and the United Kingdom.

### Supported Forms

#### New Zealand

- NZ IR330 - Tax code declaration
- NZ IR330C - Tax rate notification for contractors
- KiwiSaver Combined OptIn or OptOut
- Ministry Of Justice - MOJ
- Ministry Of Justice - Standard MOJ
- KiwiSaver Deduction Form - KS2
- KiwiSaver OptOut Request - KS10
- ACC 6231- Pre-employment check

#### Australia

- Tax file number declaration -TFN
- Superannuation (super) standard choice form

#### United Kingdom

- PAYE: starter checklist

### Sending a Form with Form Direct

To send a form with Form Direct, first make sure you have an account in one of the supported countries. Then login to your account and click the **Form Direct** button in the 'My Documents' page.

The screenshot shows the 'My Documents' page in the Secured Signing application. The page header indicates '12 Documents Used' and 'Secured Signing Credits NZD \$5.00 Left' with a 'Top Up here' link. A left-hand navigation menu includes 'My Documents', 'Admin Users', 'My Account', 'Signatures', and 'My Invitations'. A central toolbar contains buttons for 'Add Documents', 'Smart Tags', 'I Sign', 'We Sign', 'Form Filler', and 'Form Direct'. Below the toolbar are tabs for 'INBOX', 'TEMPLATES', 'IN PROGRESS', and 'SIGNED'. The 'INBOX' tab is active, showing a list of documents with checkboxes for 'My Inbox' and 'Nondisclosure Agreement'. Red arrows point to the 'My Documents' menu item and the 'Form Direct' button.

In the ‘Select your forms’ page, select the form(s) you would like to send, then click ‘Next’ to continue to the next page in the Form Direct wizard. Please note that the pages and settings on them will vary depending on which form you are sending.

Form Direct

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

Forms

- NZ IR330 - Tax code declaration
- KiwiSaver Deduction Form - KS2
- KiwiSaver OptOut Request - KS10
- ACC Pre-employment check
- NZ IR330C - Tax rate notification for contractors
- KiwiSaver Combined Optin or OptOut
- MOJ Paid Service (Public)
- MOJ Standard Free Service (Public)

Previous Next

In the ‘Invite’ page, enter the invitee/candidate details of who you are sending the form to, then click ‘Next’ to continue.

Form Direct

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

Candidate

Email Address

First Name

Middle Name

Last Name

SMS Notification

Face2Face Sign

Previous Next

In the ‘Email Template’ page, optionally enter a personal message to add to the invitation email or select one of your saved invitation email templates, then click ‘Next’ to continue.

Form Direct

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

Email Type:  Personal  Email Template Select...

Subject: Secured Signing Default Subject

Edit

Previous Next

In the ‘Setup workflow’ page, optionally change the signing due date and change signer settings if available, and add required extra information for the form if applicable. Click ‘Next’ to continue.

Finally, in the ‘Review’ page, check your invitee details and optionally edit the name of the package and choose which folder to save the document to. Click ‘Finish’ to send the form to be signed.

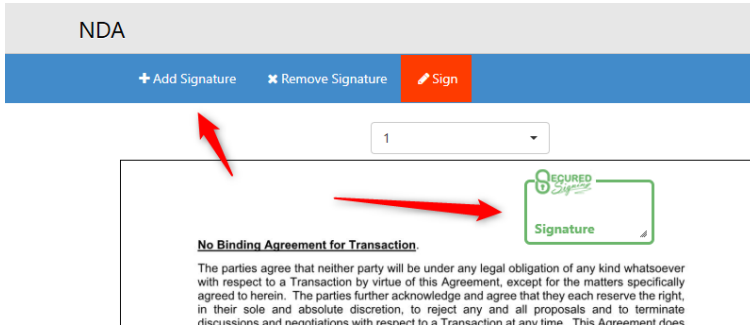
# I Sign

## Overview

With I Sign, you can upload a single document that only you need to sign, add a signature box, and click to sign.

## Upload, Tag, and Sign a Document

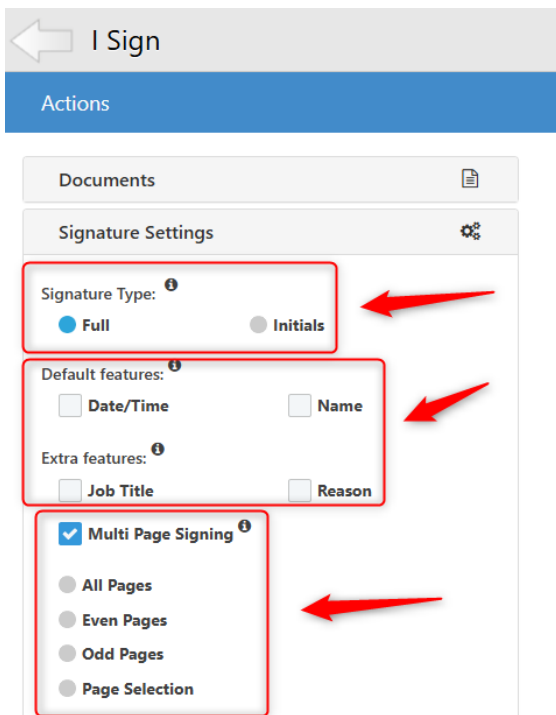
To add a signature box to the document, simply click the **Add Signature** button. Now you can place it where you need on the document. You can add as many signatures as you need by clicking the ‘Add Signature’ button again.



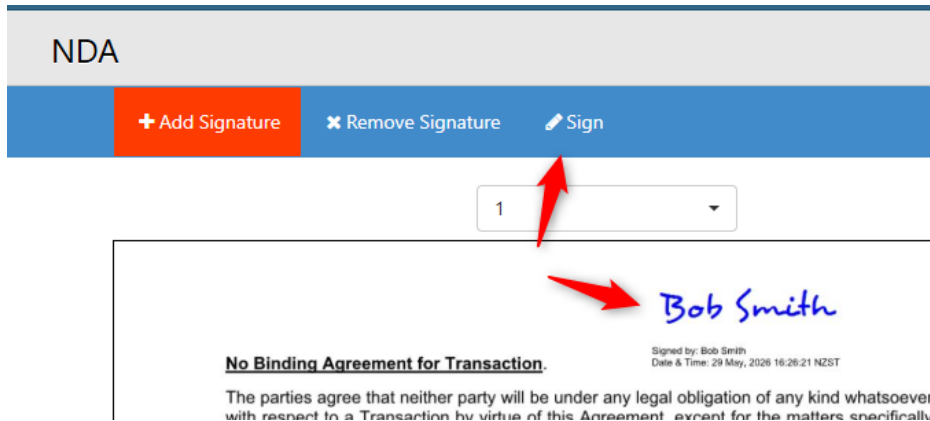
Before you sign, you can choose whether each signature should sign with your full signature or just your initials.

You can also choose which details you would like to display under your signed signature, like **Date/Time**, **Name**, **Job Title**, and more (you can setup which of these you would like to be enabled by default in **My Account > My Settings > Signature Settings**).

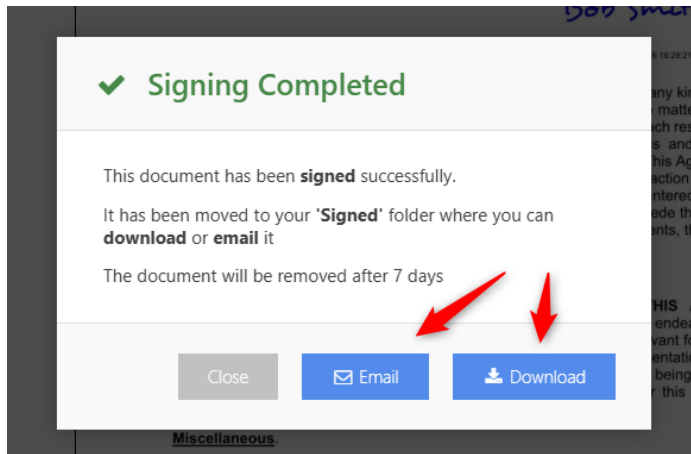
Finally, if your document has multiple pages that you need signatures placed on, you can enable **Multi Page Signing**, then select which pages to add the signature to.



Once you have placed all your signatures, click the **Sign** button to sign them. If you haven't saved a signature yet, the 'Capture Your Signatures' pop-up will display to save one, otherwise your signature(s) will be signed instantly.



You can download/email a copy of the signed document immediately, otherwise you can download/email it later from the **Signed** tab in 'My Documents'.

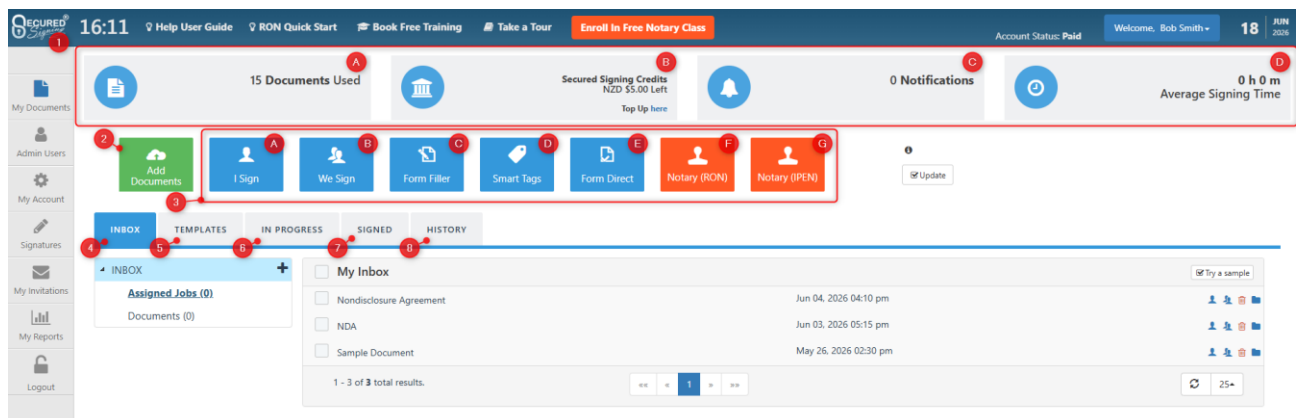


# My Documents

## Overview

In the ‘My Documents’ page you can upload and organize your documents, start sending documents for signing, track and update the signing process, see your signed documents, and more. Here is a basic overview of the ‘My Documents’ page:

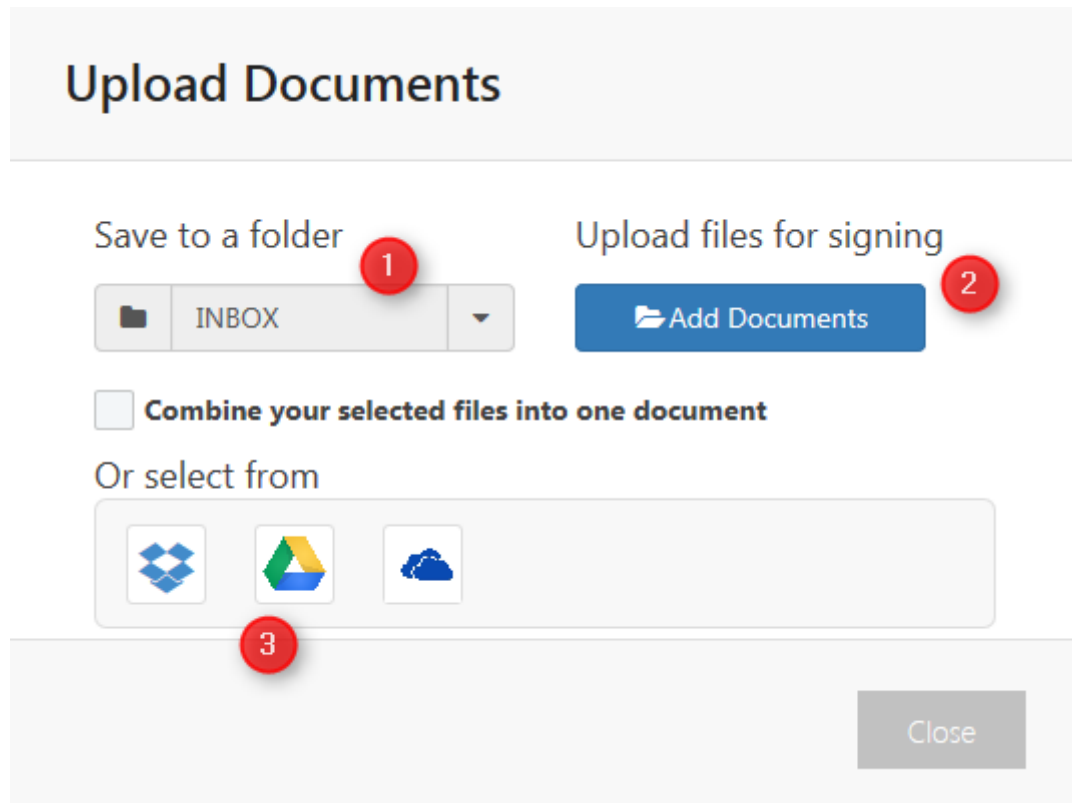
1. Account Details – some account details display at the top of the page, such as:
  - a. Documents used/documents remaining.
  - b. Secured Signing credits left, with a link to top-up.
  - c. Notifications.
  - d. The average signing time between sending documents out, and them being signed completely.
2. ‘Add Documents’ button – opens a pop-up to upload documents from your PC or from a cloud storage provide for use in Secured Signing.
3. Secured Signing Apps buttons – buttons to start using one of our apps, such as:
  - a. I Sign – sign a document yourself.
  - b. We Sign – invite others to sign.
  - c. Form Filler – create a document template.
  - d. Smart Tags – upload and send documents with smart tags.
  - e. Form Direct – send select pre-tagged forms.
  - f. Notary (RON) – send documents for Remote Online Notarization.
  - g. Notary (IPEN) – send documents for In Person Electronic Notarization.
4. ‘Inbox’ tab – documents that have been uploaded to your account but not sent for signing yet.
5. ‘Templates’ tab – includes your template list and allows you to send or manage templates.
6. ‘In Progress’ tab – shows documents that are currently in progress.
7. ‘Signed’ tab – shows documents that have been completely signed.
8. ‘History’ tab – shows documents that have been removed from the system after being deleted manually, expiring, or being moved automatically 7 days after signing.



## Add Documents

### Upload Documents

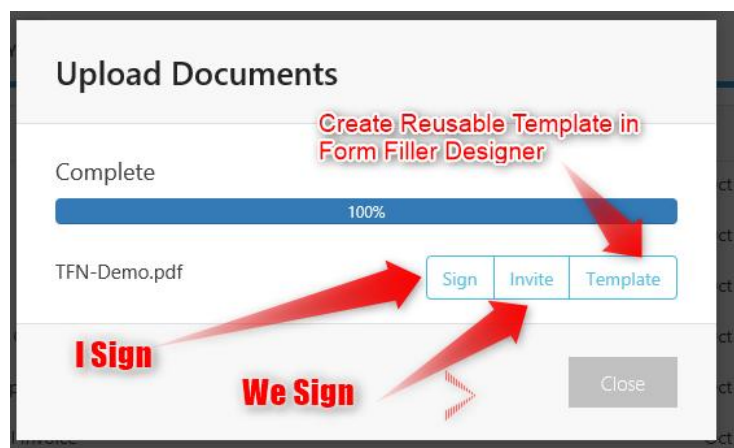
You can upload documents to Secured Signing from your local and network disks (2) or select a document from you preferred cloud storages such as Dropbox or Google drive or One Drive (3). You can redirect files to be saved in appropriate folder in your Secured Signing folder (1).



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

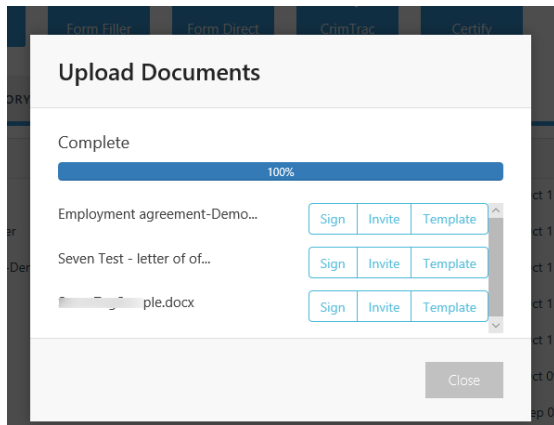
To add documents from Google Drive and Drop Box you must establish the connection and connect Secured Signing to be able to pick document from your preferred cloud storages.

Once document uploaded you can select what to do next



Secured signing support multiple file upload, press upload, browse to file location and hold the Ctrl key in your keyboard to select multiple file

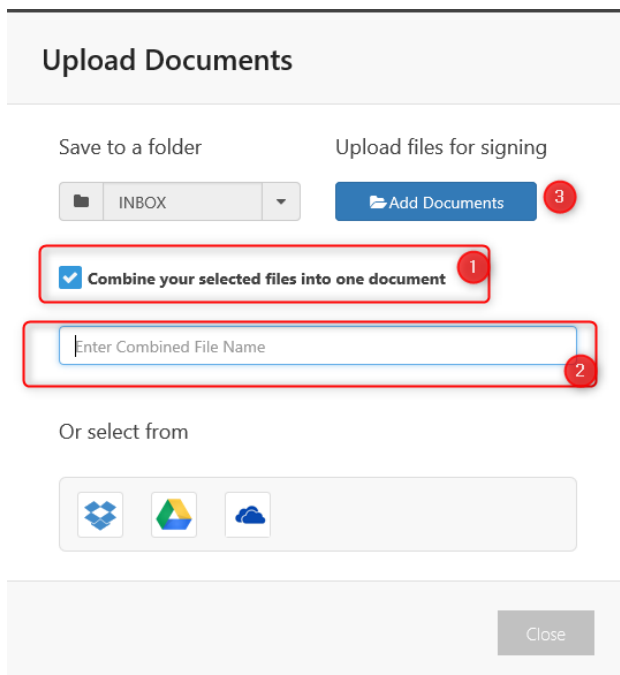
Once uploaded you will see this popup



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

### Combine documents

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



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

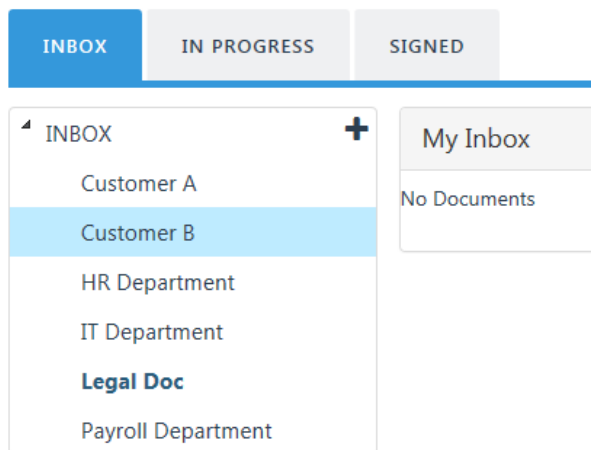
In term of document counter in combine mode, if 3 documents uploaded to be combined to new document name, the counter will count this process as 3 documents.

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

## Document Folders

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

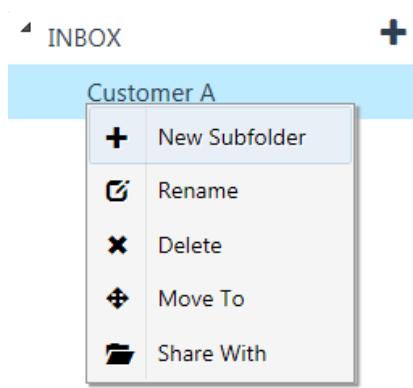
By Clicking on ‘+’ next to Inbox you can create new folder. Admin user and any other users in the account can create folders as required for their needs. Each of these folders are for personal use by each user.



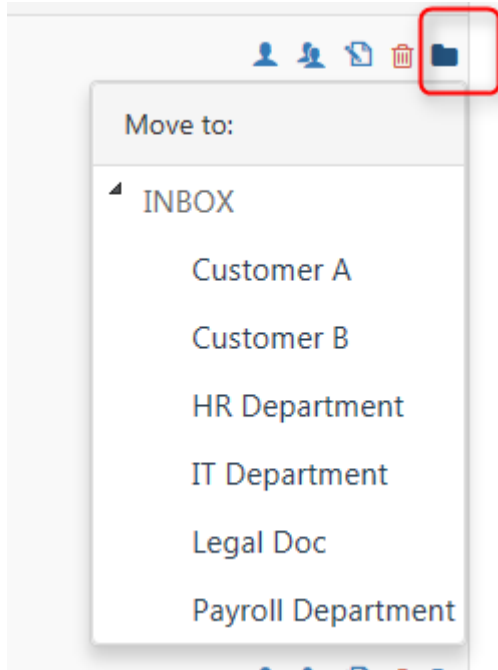
The document in the folder will change Tab location based on the signing process. First it will be in Inbox Tab, once sent for signature the document will move to In Progress Tab, once the document has been signed it will move to Signed Tab.

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

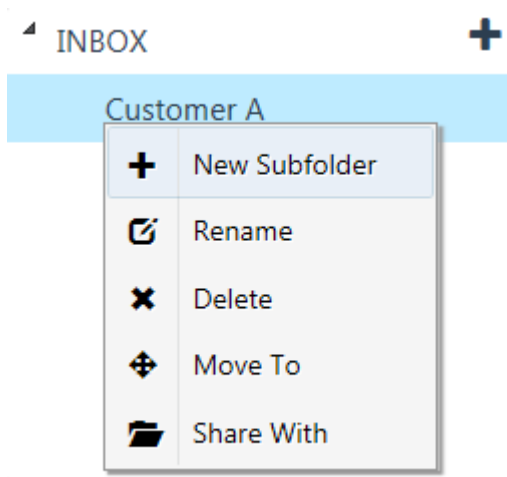
- Create subfolder
- Rename folder name
- Delete folder – it must have no documents in this folder in all documents status tabs
- Move to – you can move the folder to another folder
- Share with – only Admin user can share folder with other users in your account.



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

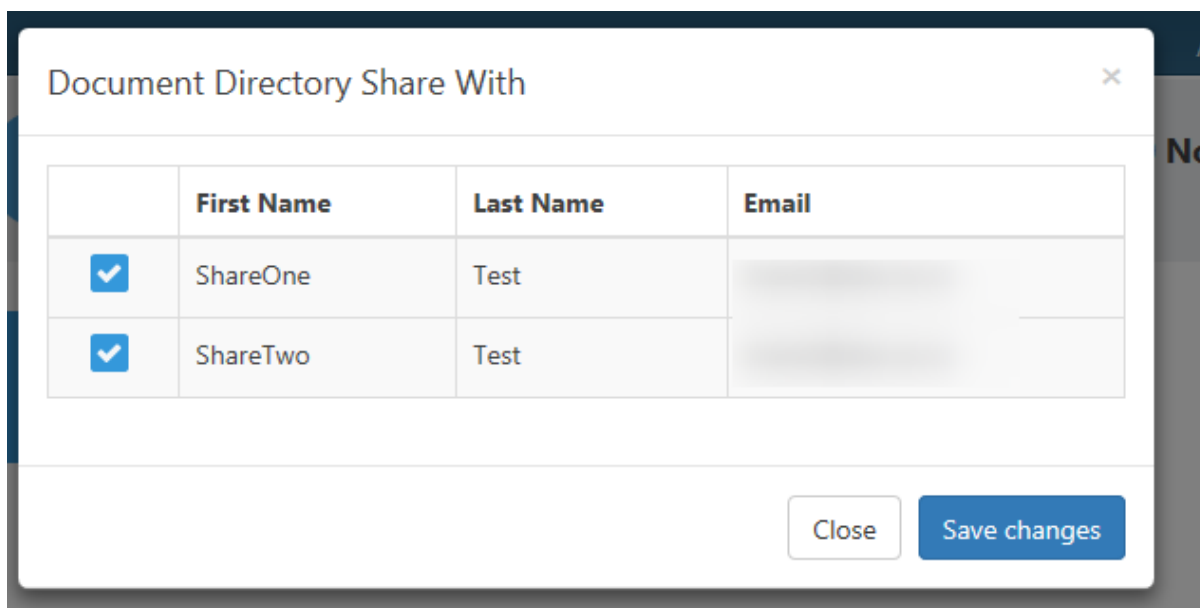


If there are multiple users in your account, admin users can share folders with other users by selecting the folder you want to share, clicking the 'More options' button or right clicking the folder, then clicking **Share With**.



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

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



### How Does Shared Folder Work?

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

#### Actions



## Inbox

In the 'Inbox' tab you can find the documents that have been uploaded to your account but not sent for signing yet.

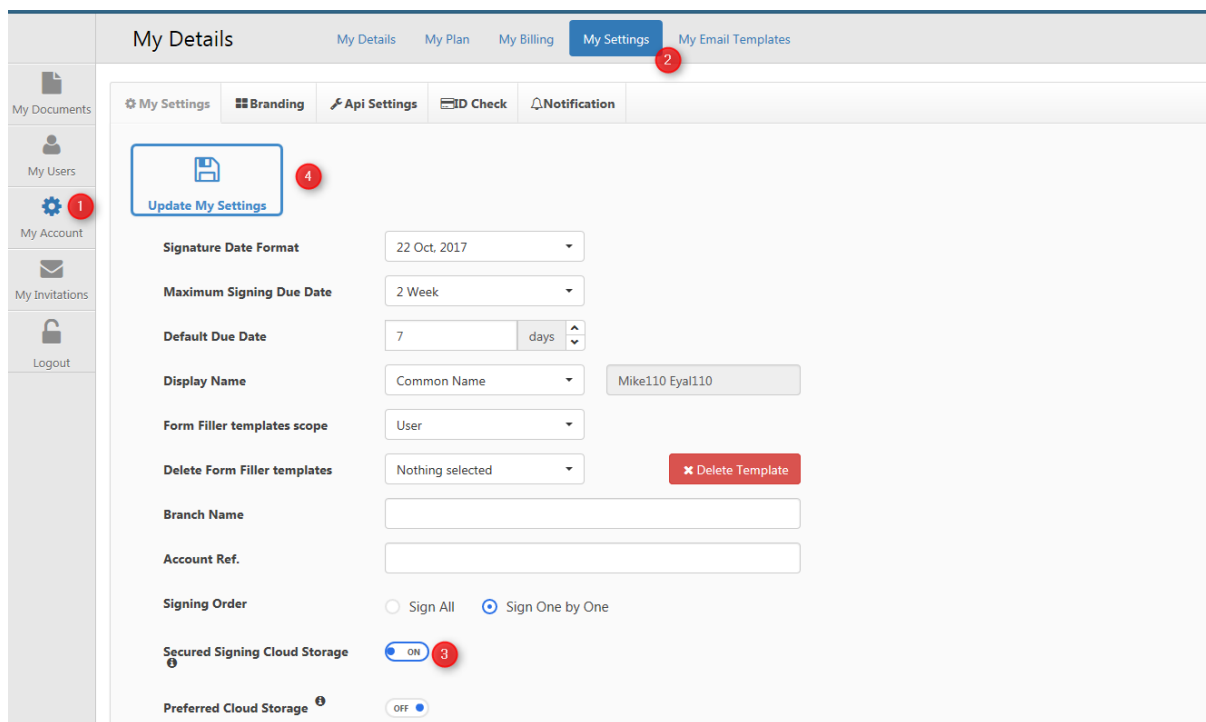
From here you can open documents in I Sign or We Sign, delete documents, and organise documents into different folders.

## History

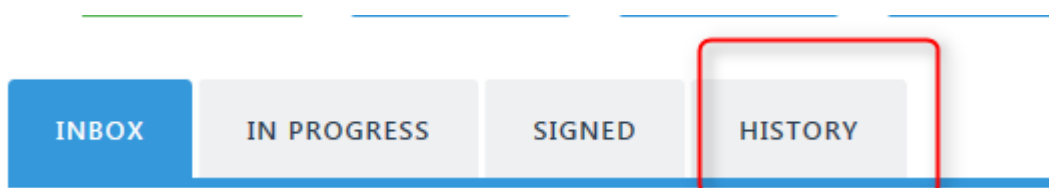
On the removal document Service, we will save the document in encrypt cloud storage for long-term archiving. The document will be accessible in the history tab.

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

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



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



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

The screenshot shows the 'My Documents' interface with the 'HISTORY' tab selected. At the top, there are navigation tabs: 'My Documents', 'My Users', 'My Documents' (active), and 'My Reports'. Below these are sub-tabs for 'ACTIVE DOCUMENTS' and 'HISTORY'. A search bar is present with the text 'Search History Doc'. Two filter boxes are highlighted with red rectangles: 'Document Folder: Select a Folder' and 'Document Date Created: Select Date Range October 1, 2017 - October 31, 2017'. Below the filters is a table with the following columns: Document Owner, Document Name, Date Created, Last Sign Date, Status, and Actions. The table contains several rows of document data. The 'Actions' column for the third row (Status: Complete) is highlighted with a red box, showing icons for view, download, and delete.

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

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

# Admin Users

## Overview

In the **Admin Users** page, admin users in a Secured Signing account can add new users and edit or remove existing users in their account. They can also manage their saved invitees here and can manage both active and history documents. This page is called **My Users** for non-admin users, and they have access to many of the same features with some exceptions that will be stated in this section of the user guide.

## My Users

### Users

In the **Users** tab, admin users can see all users in their account and edit them by clicking **Edit** for the user and then change them to an admin user or non-admin user or change their job title and company name.

Admin users can also remove non-admin users by clicking **Delete** for the user. The only way to delete another admin user is by first editing them and changing them to a non-admin user. If the user being deleted has any active documents, the admin user must select another user in the account to transfer them to.

Admin users can also add new users if they have enough users available in their plan by clicking **Add New User**.

Non-admin users can see themselves only and can edit their own job title and company name by clicking **Edit**.

Both admin and non-admin users can search for invitees they have previously invited to sign and delete them by clicking **Delete Invitees**. Deleted invitees will no longer display to be auto filled when adding an invitee to a document.

The screenshot shows the 'My Users' page with a sidebar on the left containing navigation options: My Documents, Admin Users, My Account, My Invitations, My Reports, and Logout. The main content area has tabs for 'USERS', 'INVITEES', 'WITNESSES', and 'NOTIFICATION RECIPIENTS'. Below the tabs is an 'Add New User' button, a search box labeled 'Search & Delete Invitees', and a 'Delete Invitees' button. A table lists users with columns for Full Name, Email Address, Company Name, Job Title, Last Login Time, User Type, Edit, and Delete. Two users are listed: Heath Smith (Admin) and Bob Johnson (User). Red arrows point to the 'Add New User' button, the 'Delete Invitees' button, and the 'Edit' and 'Delete' buttons for Bob Johnson.

Full Name	Email Address	Company Name	Job Title	Last Login Time	User Type	Edit	Delete
Heath Smith	jackson.bartell@securedsigning.com	Secured Signing	Designer	May 21, 2026 12:32	Admin	Edit	
Bob Johnson	j2@dsx.co.nz	Secured Signing	Tester	Jan 29, 2026 09:45	User	Edit	Delete

### Invitees

This tab allows admin users to see the invitees that all users in their account have invited to sign, as well as the logs for the documents that each invitee was invited to sign. Non-admin users can only see the invitees that they have invited.

Invited By	Invitee Name	Email Address	Last Login Time												
Heath Smith	Matt Johnson		Mar 15, 2024 10:11												
<table border="1"> <thead> <tr> <th>Doc Name</th> <th>Last Signed Date</th> <th>Status</th> <th>Log</th> </tr> </thead> <tbody> <tr> <td>NDA</td> <td>Yet to Sign</td> <td>0 of 1 Signed</td> <td><a href="#">View Logs</a></td> </tr> <tr> <td>Bank Details</td> <td>Yet to Sign</td> <td>0 of 1 Signed</td> <td><a href="#">View Logs</a></td> </tr> </tbody> </table>				Doc Name	Last Signed Date	Status	Log	NDA	Yet to Sign	0 of 1 Signed	<a href="#">View Logs</a>	Bank Details	Yet to Sign	0 of 1 Signed	<a href="#">View Logs</a>
Doc Name	Last Signed Date	Status	Log												
NDA	Yet to Sign	0 of 1 Signed	<a href="#">View Logs</a>												
Bank Details	Yet to Sign	0 of 1 Signed	<a href="#">View Logs</a>												
Ian Johnson	Nick Smith		Mar 15, 2024 08:11												

### Witnesses

This tab allows admin users to see the witnesses that all users in their account have invited to sign, as well as the logs for the documents that each witness was invited to sign. Non-admin users can only see the witnesses that they have invited.

Witness Name	Email Address	Last Login Time	Invited By										
Matt Smith		Yet to Login	Owen Johnson										
<table border="1"> <thead> <tr> <th>Doc Name</th> <th>Doc Owner</th> <th>Last Signed Date</th> <th>Status</th> <th>Log</th> </tr> </thead> <tbody> <tr> <td>NDA</td> <td>Heath Johnson</td> <td>Yet to Sign</td> <td>Meeting Scheduled</td> <td><a href="#">View Logs</a></td> </tr> </tbody> </table>				Doc Name	Doc Owner	Last Signed Date	Status	Log	NDA	Heath Johnson	Yet to Sign	Meeting Scheduled	<a href="#">View Logs</a>
Doc Name	Doc Owner	Last Signed Date	Status	Log									
NDA	Heath Johnson	Yet to Sign	Meeting Scheduled	<a href="#">View Logs</a>									
Nick Johnson		Yet to Login	Paul Smith										

### Notification Recipients

This tab allows admin users to see the saved notification recipients in their account and allows them to edit their details by clicking **Edit** or remove them by clicking **Delete**. They can all add a new notification recipient by clicking **Add New Notification Recipients**. Notification recipients added here can be added to a signing process when sending a document, and they will receive a notification email when their invitee receives an invitation email.

Full Name	Email Address	Company Name	Job Title	Last Login Time	Is Default	Is Default Reviewer	Edit	Delete
Matt Smith	j17@dsx.co.nz	Apple	Manager	Yet to Login	No	No	<a href="#">Edit</a>	<a href="#">Delete</a>
Nick Johnson	j18@dsx.co.nz	Google	Designer	Aug 11, 2025 12:17	No	No	<a href="#">Edit</a>	<a href="#">Delete</a>

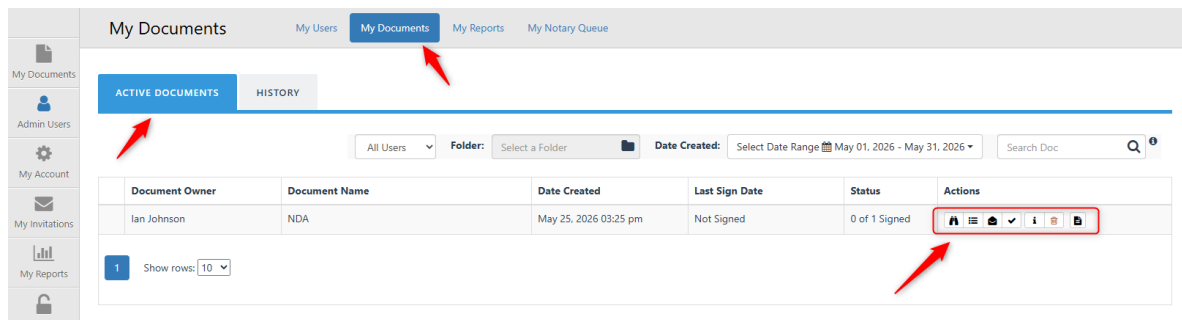
## My Documents

### Active Documents

In the **Active Documents** tab, admin users can monitor and manage all users' currently active documents.

The following actions are available for admin users to monitor and manage active documents:

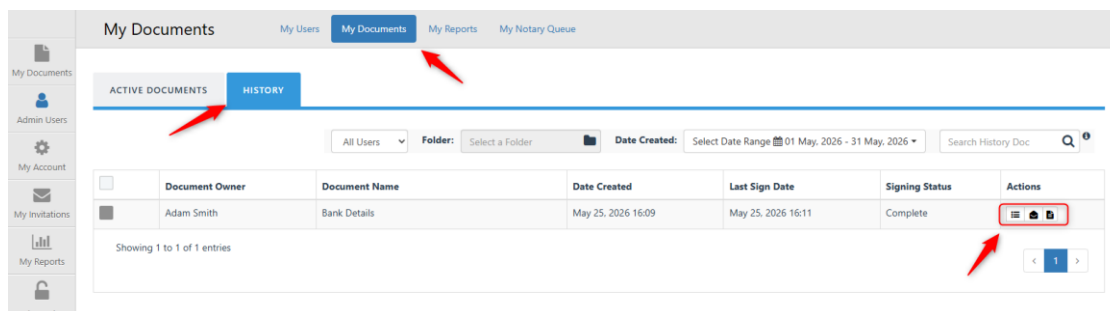
- View the document.
- View the document log.
- View sent emails for the document.
- Verify signatures on the document.
- Check the signing status of the document.
  - Extend the signing due date.
  - Manage completion recipients (if account setting is enabled).
  - Schedule/reschedule a video signing meeting.
  - Update invitee details.
  - Send reminder emails.
- Delete the document.
- Check the signing completion certificate.



### History

In the **History** tab, admin users can see all users' documents that have been deleted or completed, or that have expired more than 7 days ago. If **Secured Signing Cloud Storage** is not enabled in account settings, the following actions are available for the documents:

- View the document log.
- View sent emails for the document.
- View the signing completion certificate.
- View the notary journal (for RON/IPEN documents with Electronic Notary Journal enabled).
- View video signing info (for documents with video signing enabled).



If **Secured Signing Cloud Storage** is enabled in account settings, documents are saved to the **History** tab 7 days after being signed and the below additional actions are available:

- View the document.
- Remove the document from cloud storage.
- Sign the document in I Sign.
- Invite others to sign the document in We Sign.

Please note that the additional actions are only available for documents that were completed, not for documents that expired or were deleted.

The screenshot shows the 'My Documents' page with the 'History' tab selected. A table lists document entries. The first entry is for 'Heath Smith' with document name 'NDA', created on Feb 12, 2026, and signed on Mar 4, 2026. The 'Actions' column for this entry contains icons for view, delete, sign, and invite. Red arrows point to the 'My Documents' tab, the 'History' sub-tab, and the action icons.

	Document Owner	Document Name	Date Created	Last Sign Date	Signing Status *	Actions
<input type="checkbox"/>	Heath Smith	NDA	Feb 12, 2026 13:41	Mar 4, 2026 09:10	Complete	

## My Reports

Clicking 'My Reports' in 'Admin Users' takes you to the 'My Reports' page, which is discussed in the '[My Reports](#)' section of the user guide.

## My Notary Queue

The 'My Notary Queue' page in 'Admin Users' is discussed in the '[Queue Document Management](#)' section in the user guide.

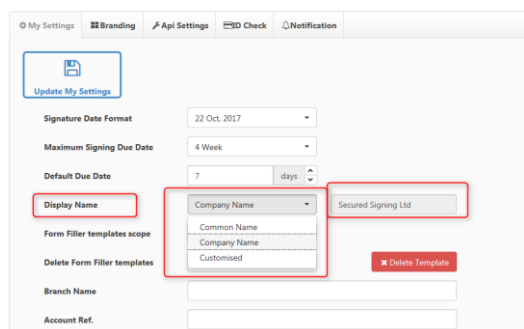
# My Account

## My Settings

### My Settings

#### Display Name

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

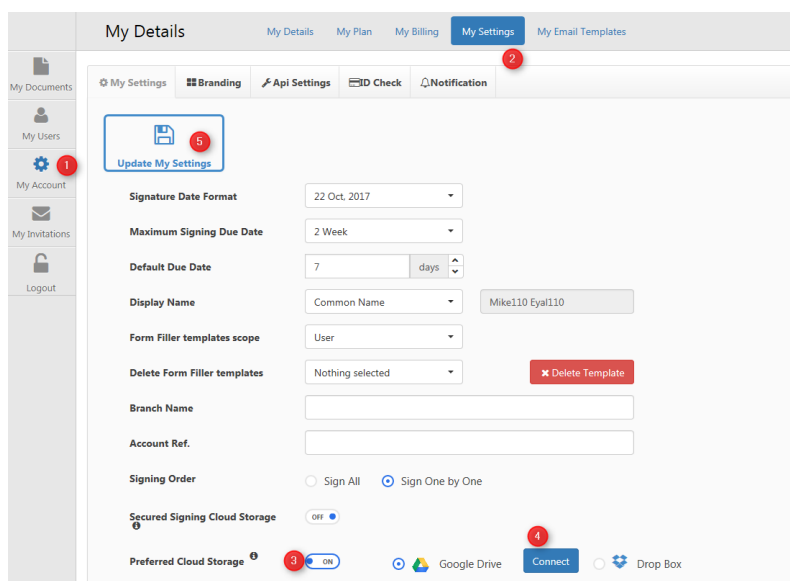


#### Preferred Cloud Storage

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

For long-term archiving you can setup to save the signed document in your preferred cloud storages such as Google Drive or Dropbox. Once the document has been signed in either I Sign, We Sign, Form Filler, and Form Direct the signed document will be saved in your preferred cloud storage. After 7 days from when the document has been signed it will be removed for your Secured Signing account and an email notification will be sent out to document owner.

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



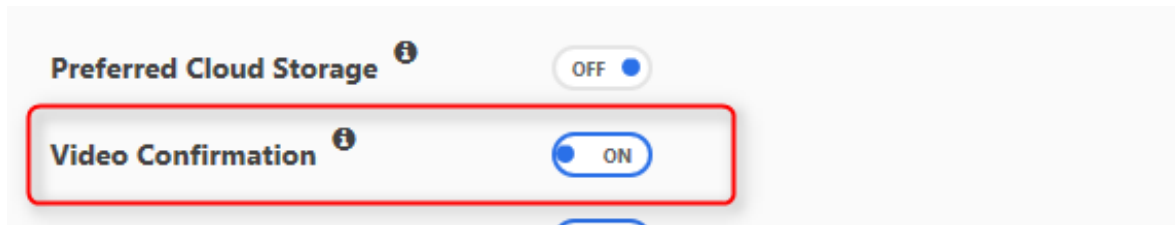
### Video Confirmation

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

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

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

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



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

### Invitation Workflow

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

### Check Invitees

Stu Wood Edit Completion Email Edit Invitation Email Select Attachments

<input type="text" value="info@securedsigning.com"/>	<input type="text" value="Stu"/>	<input type="text" value="Wood"/>
<input type="checkbox"/> Enable SMS Notification	<input type="checkbox"/> Enable SMS Authentication	<input checked="" type="checkbox"/> <b>Video Confirmation</b> ⓘ
<input type="checkbox"/> Enable IDCheck	<input type="checkbox"/> Review Before Signing	
<input type="checkbox"/> Face2Face Sign		

Cancel Send

### Or in Form Direct select video confirmation

Form Direct

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

Due Date: 29/10/2017 10:37 am

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

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

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

INBOX | IN PROGRESS | SIGNED | HISTORY

Search: orgi | 10 | [Icons]

Name	Status	Last Signed	Actions
[Redacted]	Complete	Oct 18, 2017 02:21 p...	[Icons]
[Redacted]	Complete	Oct 18, 2017 02:19 p...	[Icons]
[Redacted]	Complete	Oct 18, 2017 01:49 p...	[Icons]

Videos Confirmation Detail

Invitee: Stu Wood -> https://[Redacted] [Password: [Redacted]]

Showing 1 to 3 of 3 entries

The signed document will have an additional page with video confirmation details.

Anyone who holds the signed document is able to access the video.

## Video Confirmation

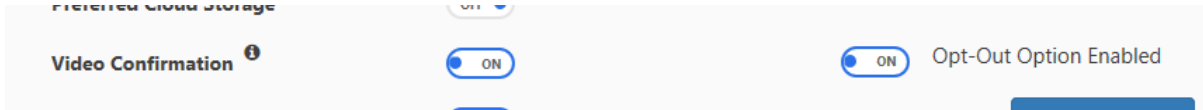
Invitee: Stu Wood, Video URL: https://[Redacted], Password: [Redacted]

### Opt-Out Option

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

To make video confirmation mandatory;

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



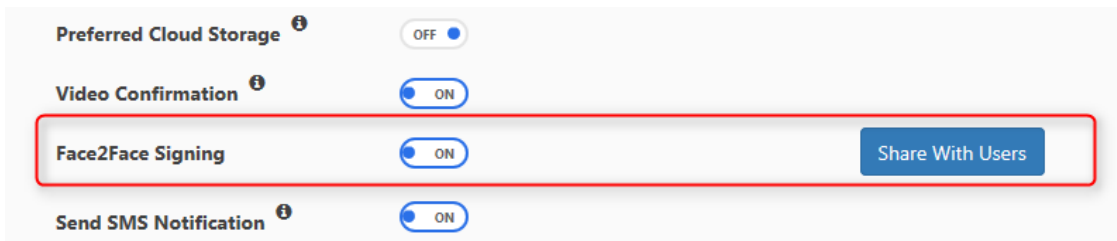
### Face2Face Signing

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

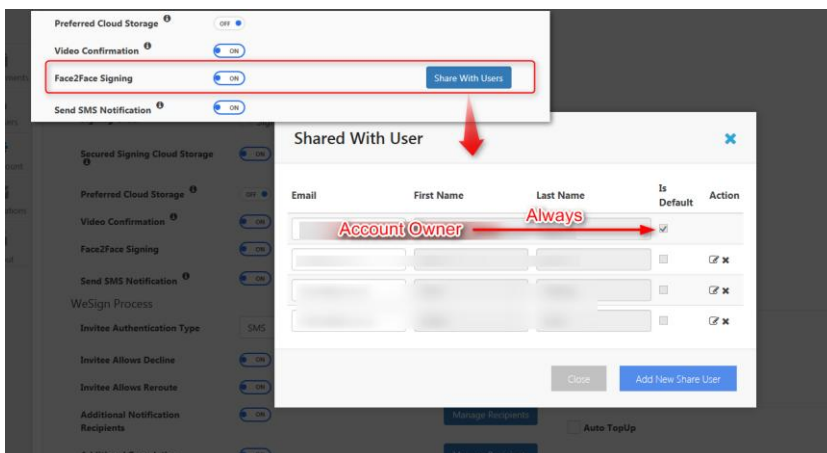
To improve security a SMS code will be sent to each invitee to access the document and initiate the signing process.

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

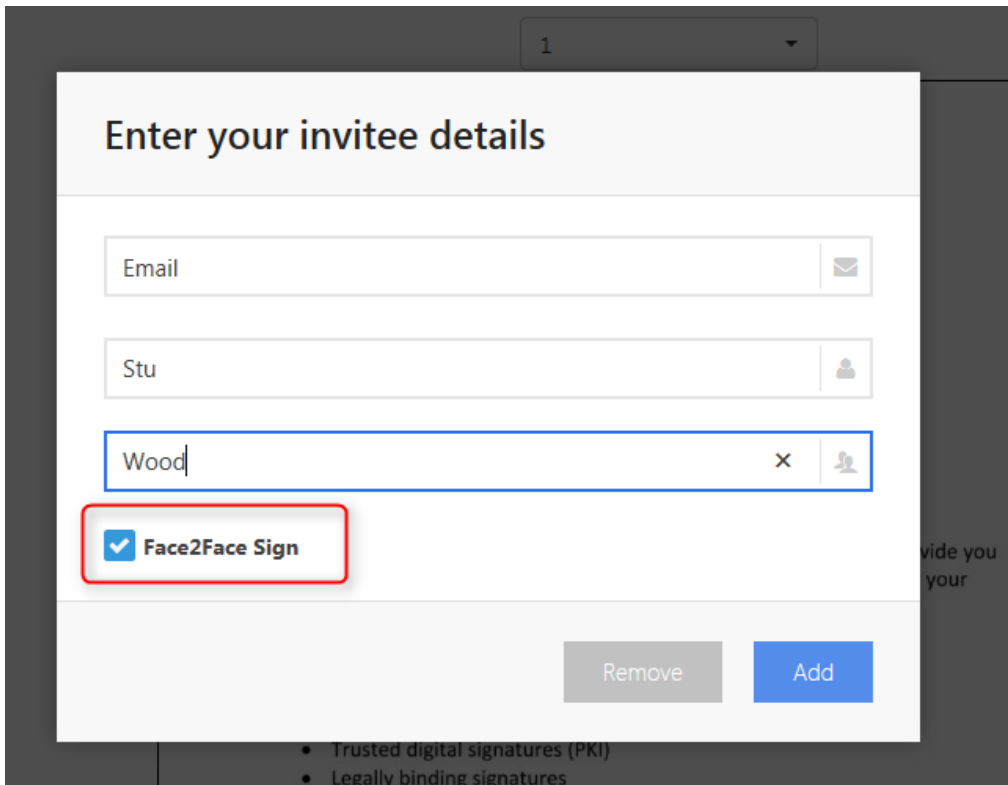
To setup F2F in your account go to My settings and switch to On Face2Face signing.



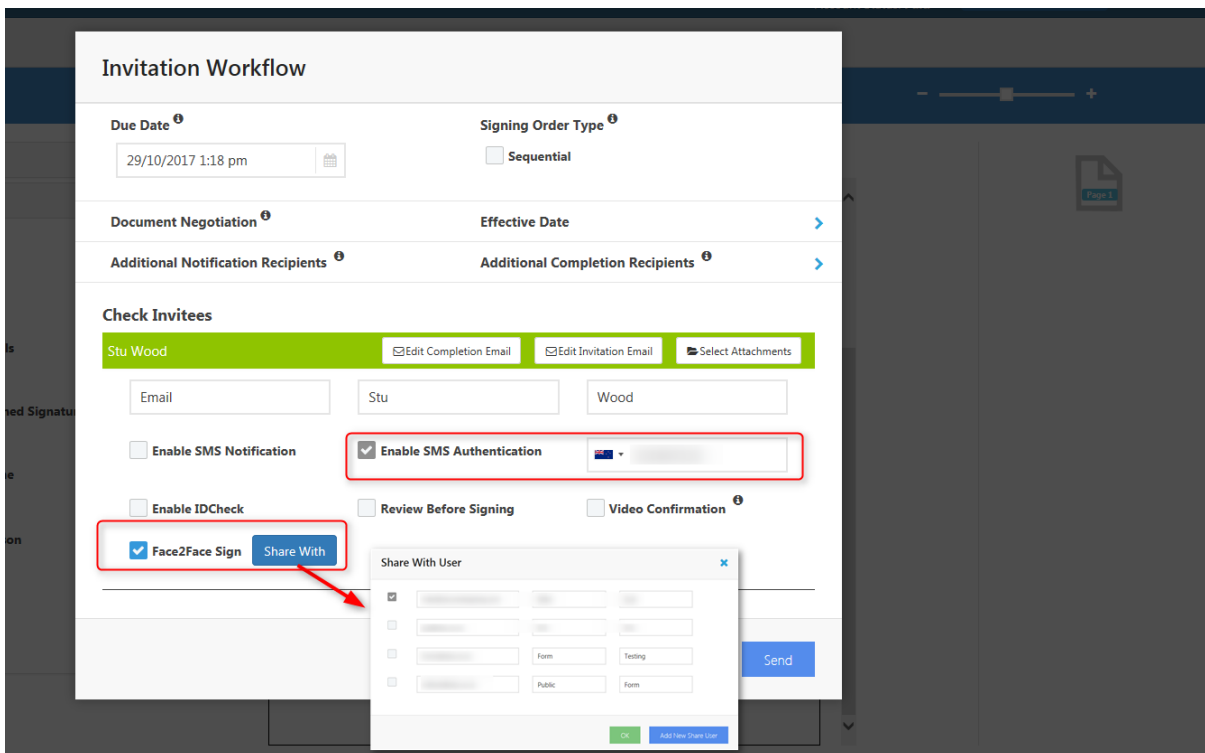
The F2F signing process / link can be shared with any Secured Signing Paid account users. To set it up click Share with Users, it can also be done later during the F2F invitation process.



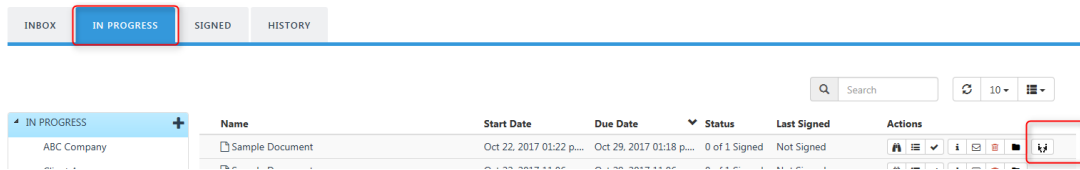
In We Signing Process, add invitee and tick F2F, email address is not required. However, if you enter an email address the signed document will be sent to invitee upon completion.



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



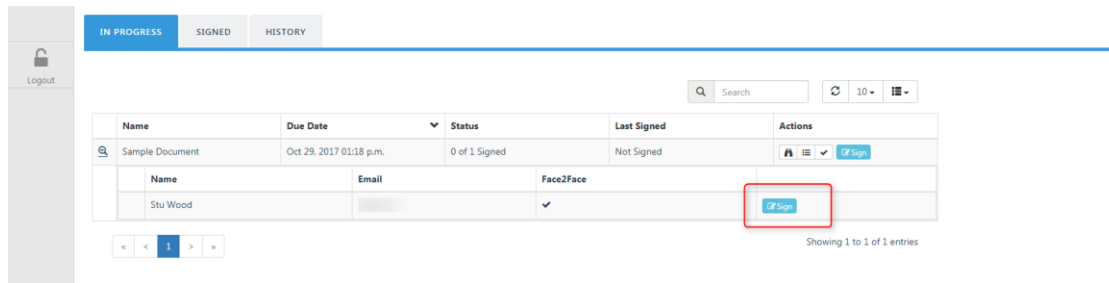
Document Owner / Account owner can access F2F signing process for this document from in progress tab and clicking on F2F icon



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

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

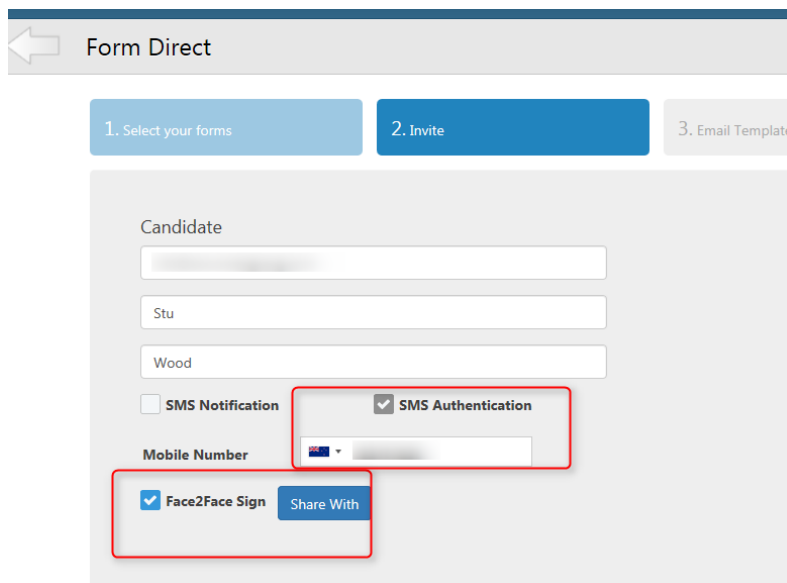
Shared user can login in F2F portal <https://www.securedsigning.com/Face2Face/Login> with his Secured Signing user ID and password.



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

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

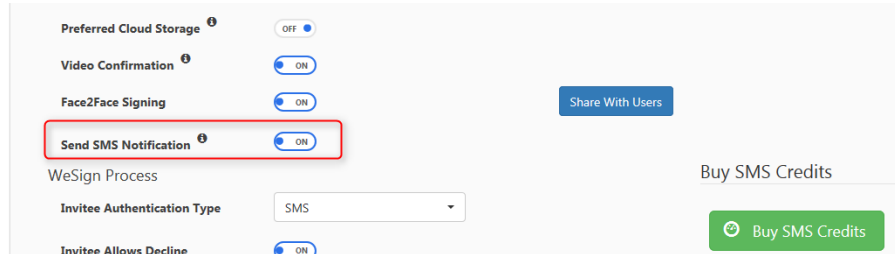
F2F in Form Direct process tick the F2F for invitee, enter Mobile phone and share with other paid Secured Signing account.



### Send SMS Notification

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

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

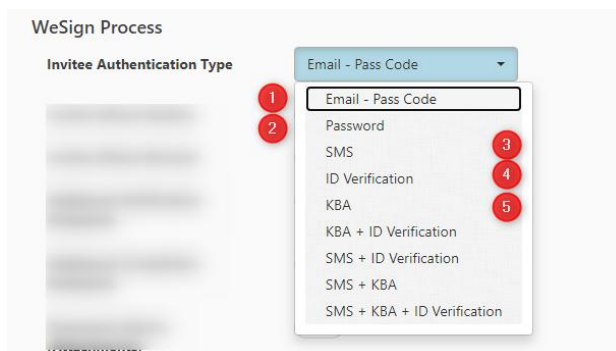


The SMS link is protecting by a security code. Invitee can initiate the signing process from the SMS and complete to signing process from their mobile phone. Internet access is required.

### Invitee Authentication Type

You can find the setting for that in My Account -> My Settings

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



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

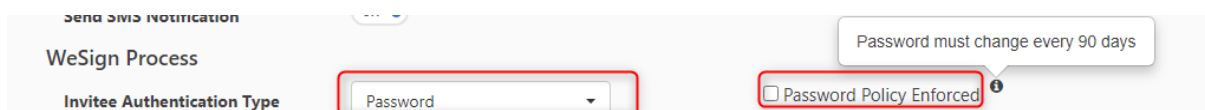
Video Confirmation is an additional way to know who was behind the device at the time of signing.

### Email / Passcode

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

### Password

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

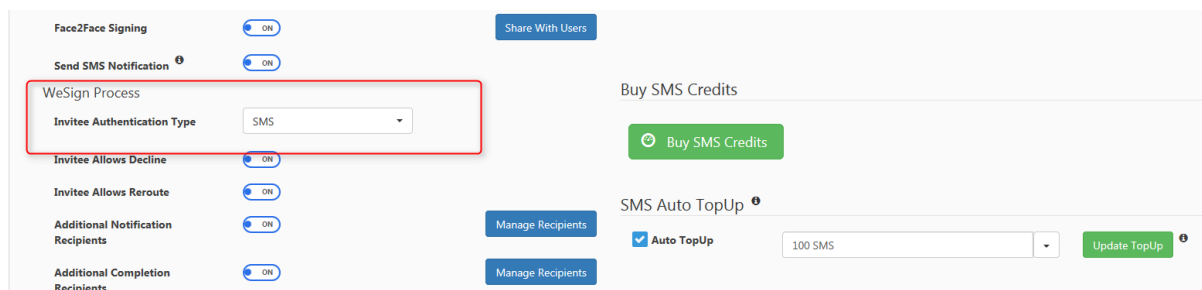


## SMS

Multi-factor authentication- The invitation is sent to the invitees’ email and once they click on the link to access the document an SMS code is sent to the invitee’s mobile phone. The Sender must enter the invitee’s mobile phone number during signing process setup. SMS has extra cost, look to our pricing page for SMS pricing. SMS Authentication – 2 Factors authentication

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

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



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

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

### Document Log for "Sample Document"

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

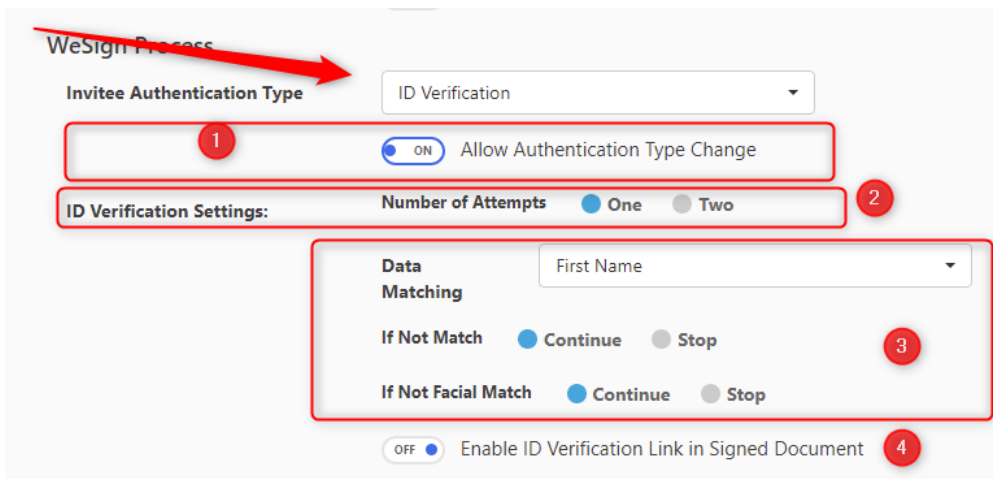
### ID Verification

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

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

### ID Verification Settings

Setting in My Account -> My Setting

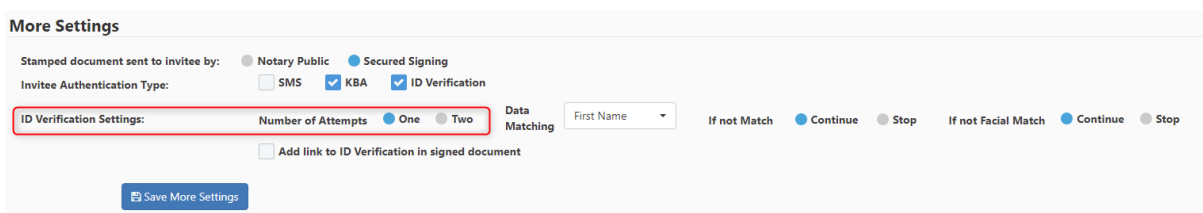


### Part 1

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

### Part 2

### ID Verification Number of Attempts



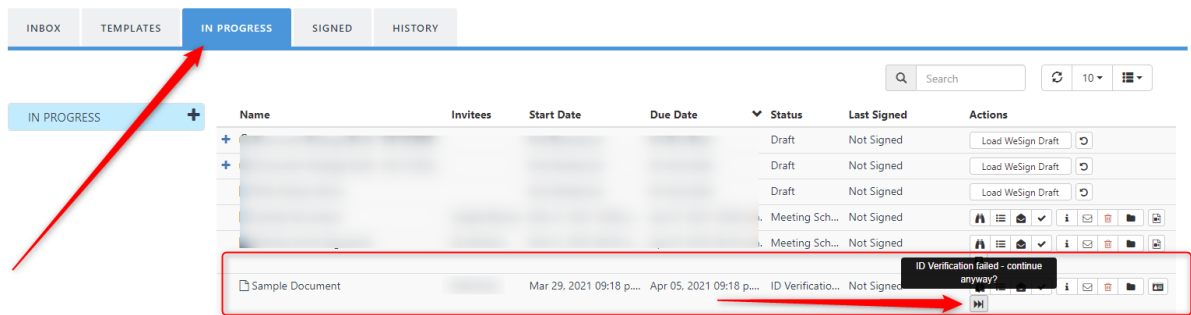
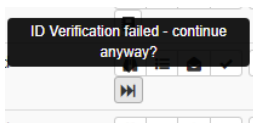
Signer / client need to capture / scan good quality picture of Government ID, sometimes the image is **not meeting the standard to analysis due to cut image’s edges or finger blocking some of the ID data.**

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

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

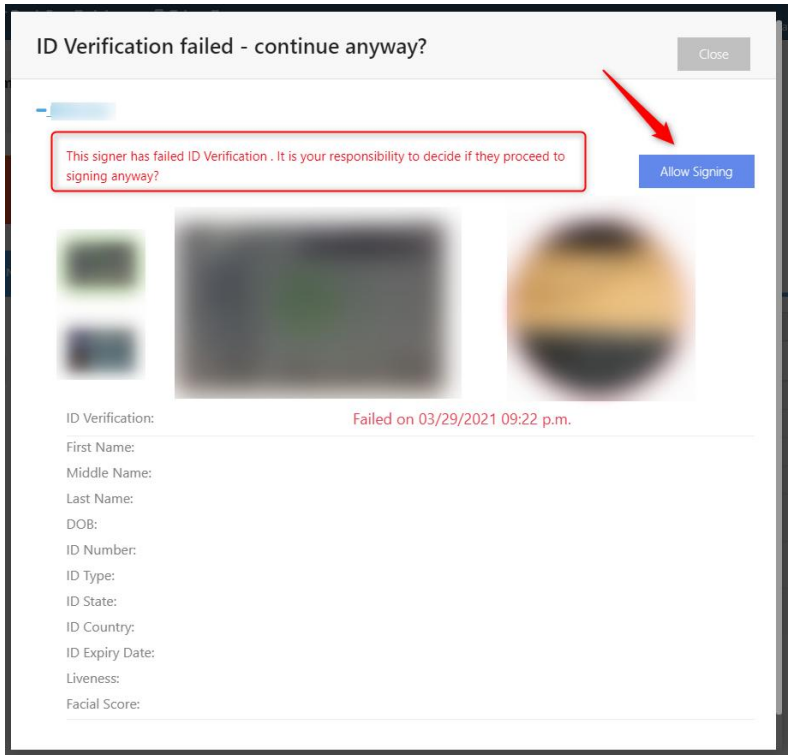
In case both attempts failed in ID Verification signer / client can’t access RON / Video Signing / signing process, however we enable sender to control this process manually and allow signer / client to access RON / Video Signing / Signing process.

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



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

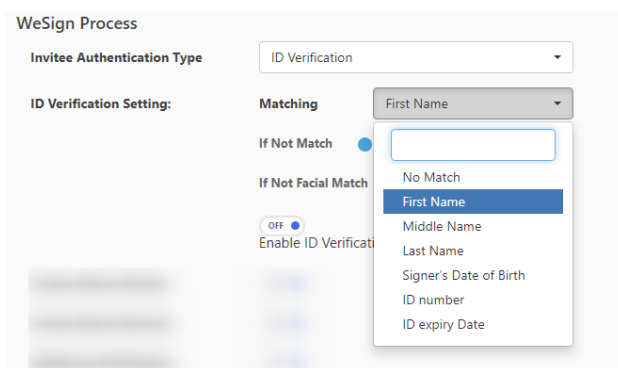
**This signer has failed ID Verification. It is your responsibility to decide if they proceed to signing anyway?**



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

### Part 3

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



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

**WeSign Process**

**Invitee Authentication Type** ID Verification

**ID Verification Setting:**

**Matching** First Name

If Not Match  Continue  Stop

If Not Facial Match  Continue  Stop

OFF  Enable ID Verification Link in Signed Document

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

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

**Invitation Workflow**

**Due Date** Nov 1, 2020 9:02 am

**Signing Order Type**  Sequential

**Video Signing**  Enable

**Check Invitees**

LORRAIN ADORNATO [Edit Invitation Email](#)

LORRAIN

Authentication: ID Verification

Matching: First Name  LORRAIN If not Match  Continue  Stop

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

Video Confirmation  Face2Face Sign

Cancel Send

#### Part 4

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

### Knowledge Base Authentication – KBA

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

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

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

## Invitee Allows Decline

### Decline & Continue signing in package

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

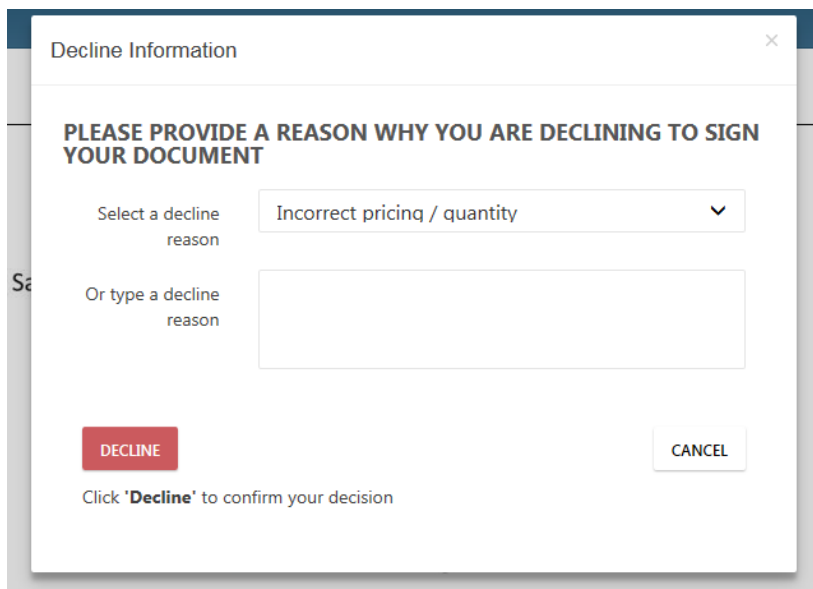
Once a document has been declined by one of the invitees, the other invitees will be able to view the document in the signing process but won't be able to sign this document anymore. This means the signing process for this particular document in the package has stopped but all other documents in the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

How to set this up?

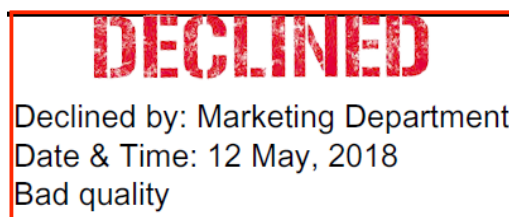
Login to your Secured Signing account and go to My Account -> My Setting -> under We Sign Section. Enable Invitee Allows to Decline and tick continue in package signing process. Don't forget to press update my settings at the top of the page.



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

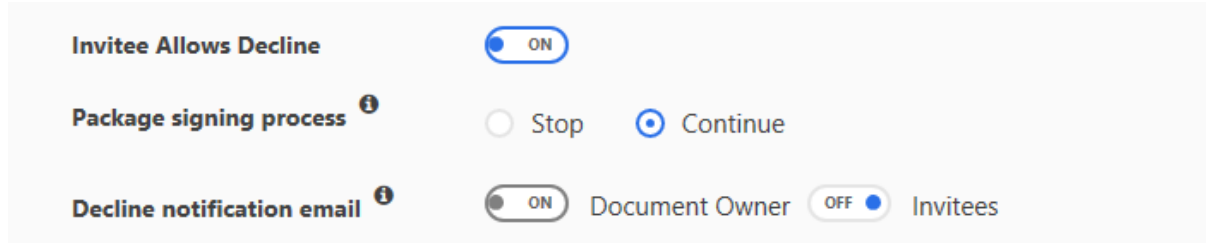


We've also added a decline stamp which includes who declined the document, why and date and time.



### Decline email notification

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



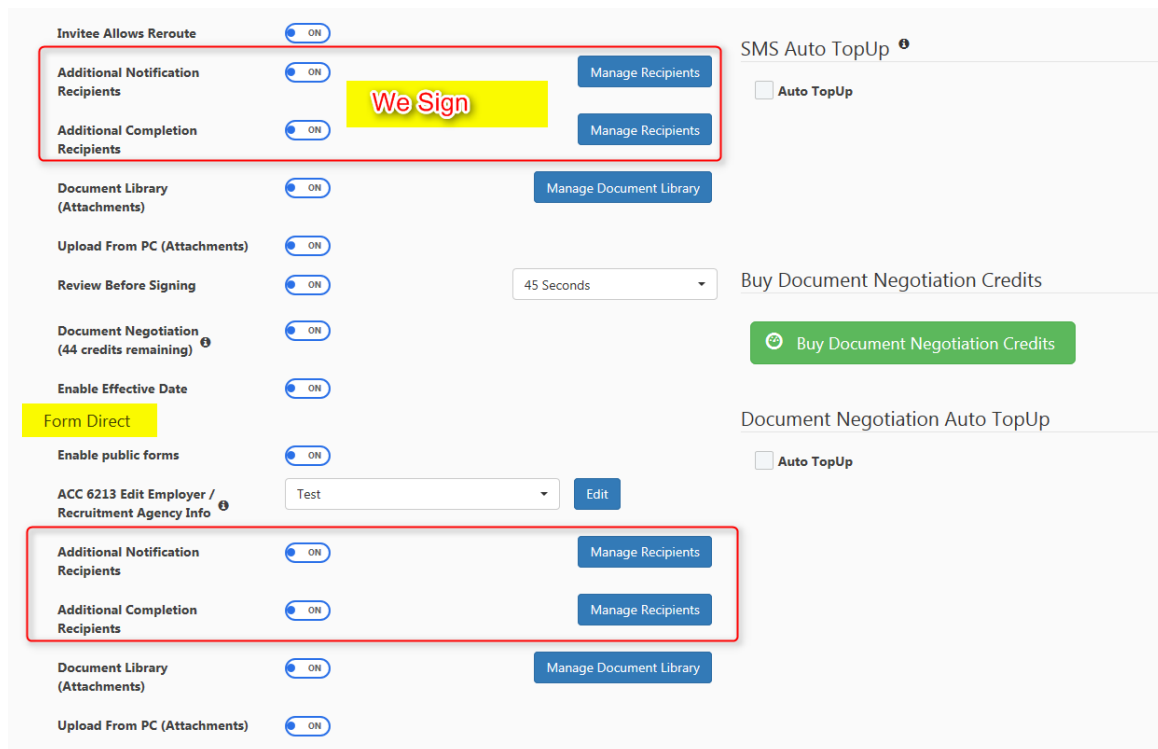
The document owner always will receive email notification about the document that has been declined and by which invitee. However, if you enable Invitees to On, all other invitees will also receive an email notification that the document has been declined and by which invitee.

### Additional Notification Recipients

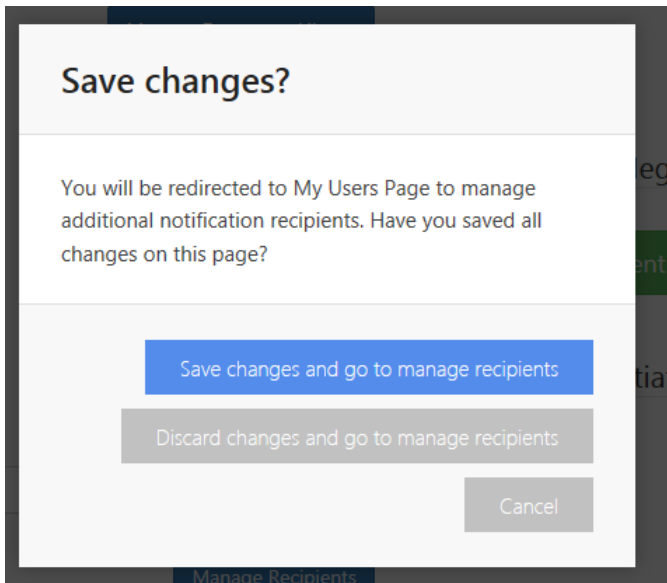
Secured Signing supports additional notification system, to notify additional people of the signing process, even when they don't need to sign at all.

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

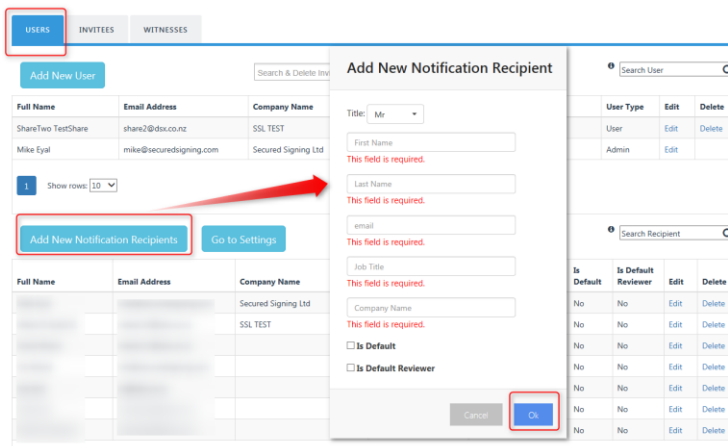
To set it up login to your Secured Signing account -> My Account -> My Settings -> Switch on Additional notification recipients and additional completion recipients in We Sign and Form Direct as needed.



Click manage recipients

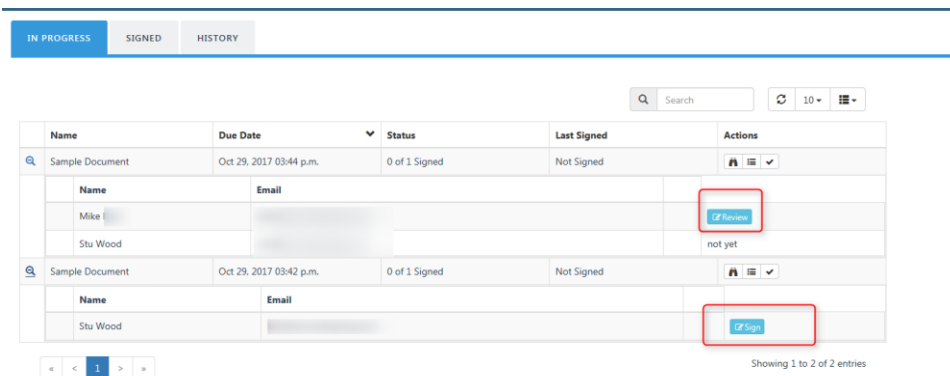


Click on the blue button to manage or add new additional recipients.



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

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



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

### In We Sign process

**Invitation Workflow**

Due Date: 29/10/2017 3:15 pm | Signing Order Type: Sequential

Document Negotiation: Effective Date: >

**Additional Notification Recipients** (highlighted):  Enable | View/Manage | 1 Selected.

**Additional Completion Recipients**:  Enable

**Check Invitees**

Stu Wood | Edit Completion Email | Edit Invitation Email | Select Attachments

info@securedsigning.com | Stu | Wood

Enable SMS Notification |  Enable SMS Authentication

Enable IDCheck |  Review Before Signing |  Video Confirmation

Face2Face Sign

Cancel | Send

### In Form Direct

**Form Direct**

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

Due Date: 29/10/2017 3:21 pm

**Additional Notification Recipients** (highlighted):  Enable | View/Manage | 1 Selected.

**Additional Completion Recipients**:  Enable

Signer Type	First Name	Last Name	Email	Mobile
Candidate	Stu	Wood		

Video Confirmation

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

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

Adding one or more reviewers to your signing workflow captures the approval of a manager or advisor in the document log. Reviewers are invited to read and approve or reject the document before the signing process starts. Including reviewers in the signing workflow removes manual pre-approval processes and ensures the signing process starts the minute approval is granted.

**Select Notification Recipients**

Reviewer

Reviewer: info@securedsignin... | Stu Wood |  Enable |  Reviewer

Reviewer

Reviewer: David | Wood |  Reviewer |  SMS Authentication

Reviewer: Stu Wood |  Enable |  Reviewer

Ok | Add New Recipient

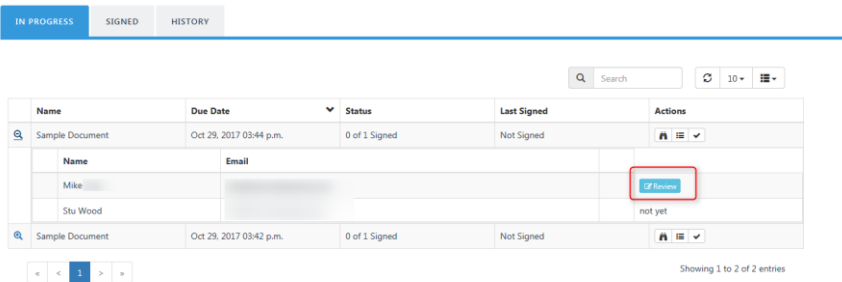
The reviewer will receive an email notification to review the document first.

Review can be set at the document level and at the invitee level reviewer can login from the notification portal to review many documents at

<https://www.securedsigning.com/Recipients/Login> or access from email notification.

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

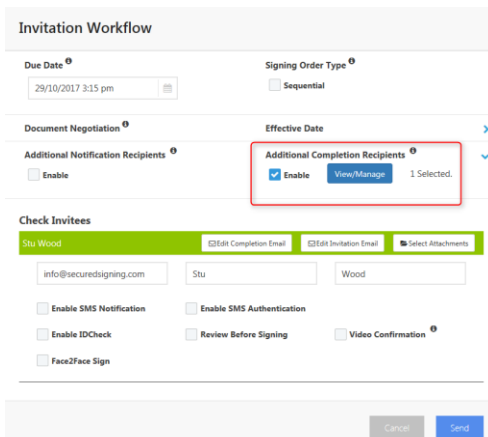
The reviewer will be able to review document at notification portal



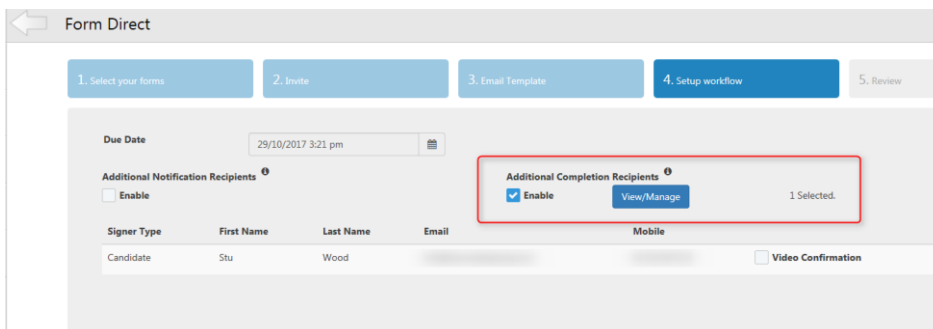
### Additional Completion Recipients

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

### In We Sign Process



### In Form Direct



### Attachments

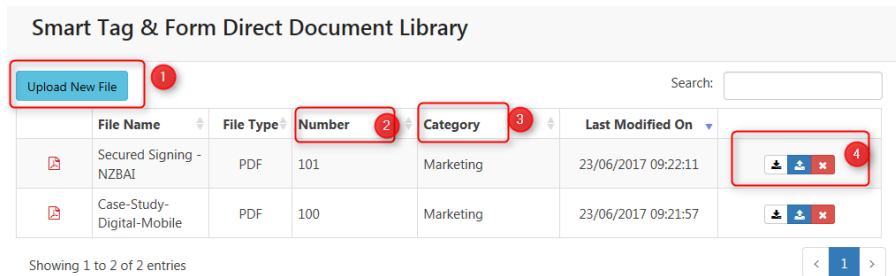
At times the document owner will need to add additional attachment to email invitation, most likely these attachments are marketing flyers of polices or guidelines. You can do it with Secured Signing at no extra cost.

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

First enable document library in My Account -> My Settings

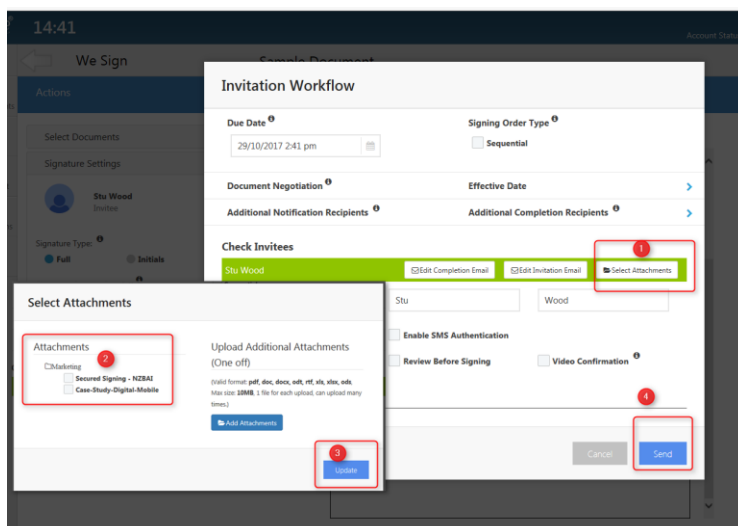


To manage and upload documents to document library click manage document library.



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

### In We Sign process



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

Select the forms and the documents attachment from appropriate list.

And then send.

In Smart Tag you can tick the attachment next to invitee

### Smart tags

**Please check your invitees and recipients**

SmartTagSample.docx

Invitees:

1  Stu  Wood  Attachments

SMS Notification  SMS Authentication

Enable IDCheck  Review Before Signing  Video Confirmation

Send Completion Email  Face2Face Sign

Then select the document from document library and press next

### Smart tags

Please select any additional attachments

Attachments

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

All Invitees Use Same Attachments

Upload Additional Attachments (One off)

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

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

### Review Before Signing

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

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



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

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

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

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

### Check Invitees

Stu Wood Edit Completion Email Edit Invitation Email Select Attachments

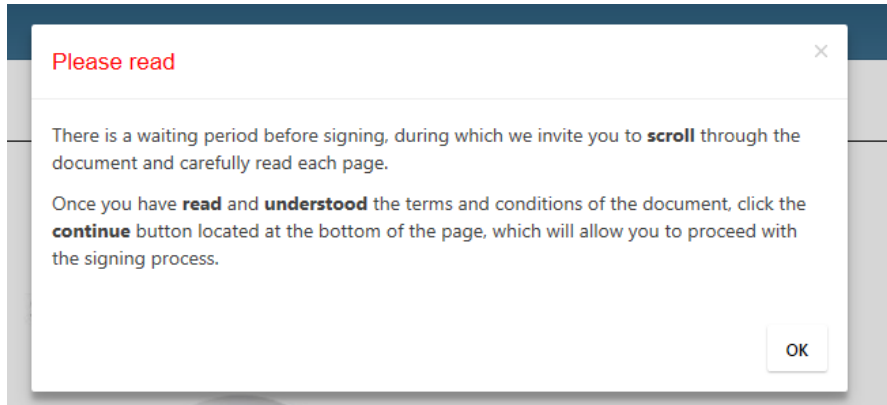
Enable SMS Notification  Enable SMS Authentication

Enable IDCheck  Review Before Signing  Video Confirmation ⓘ

Face2Face Sign

Cancel Send

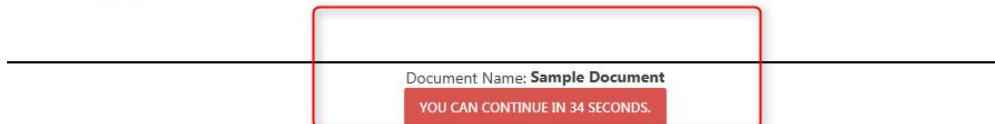
Signing process – Invitee will read the following popup instructions to read and scroll down to press continue



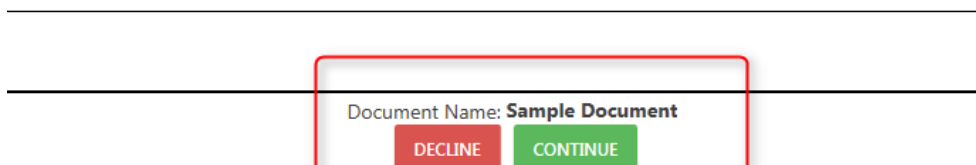
The most common selected wait time is 30 secs.

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

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



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



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

Document Log for "Sample Document"

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

### Document Negotiation

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

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

First enable document negotiation in My Account My Settings - > and buy Credit.

Each document negotiation process has a cost

Upload From PC (Attachments)  ON

Review Before Signing  ON

Document Negotiation  ON (44 credits remaining)

Enable Effective Date  ON

No wait

Buy Document Negotiation Credits

Buy Document Negotiation Credits

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

### Invitation Workflow

Due Date <sup>i</sup>  
29/10/2017 10:19 am

Signing Order Type <sup>i</sup>  
 Sequential

Document Negotiation <sup>i</sup>  
 Enable (44 credits remaining)

Effective Date <sup>i</sup>  
 Enable

Additional Notification Recipients <sup>i</sup>

Additional Completion Recipients <sup>i</sup>

### Check Invitees

1. Mike  Edit Completion Email Edit Invitation Email Select Attachments

Mike

Enable SMS Notification  Enable SMS Authentication

Enable IDCheck  Review Before Signing  Video Confirmation <sup>i</sup>

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

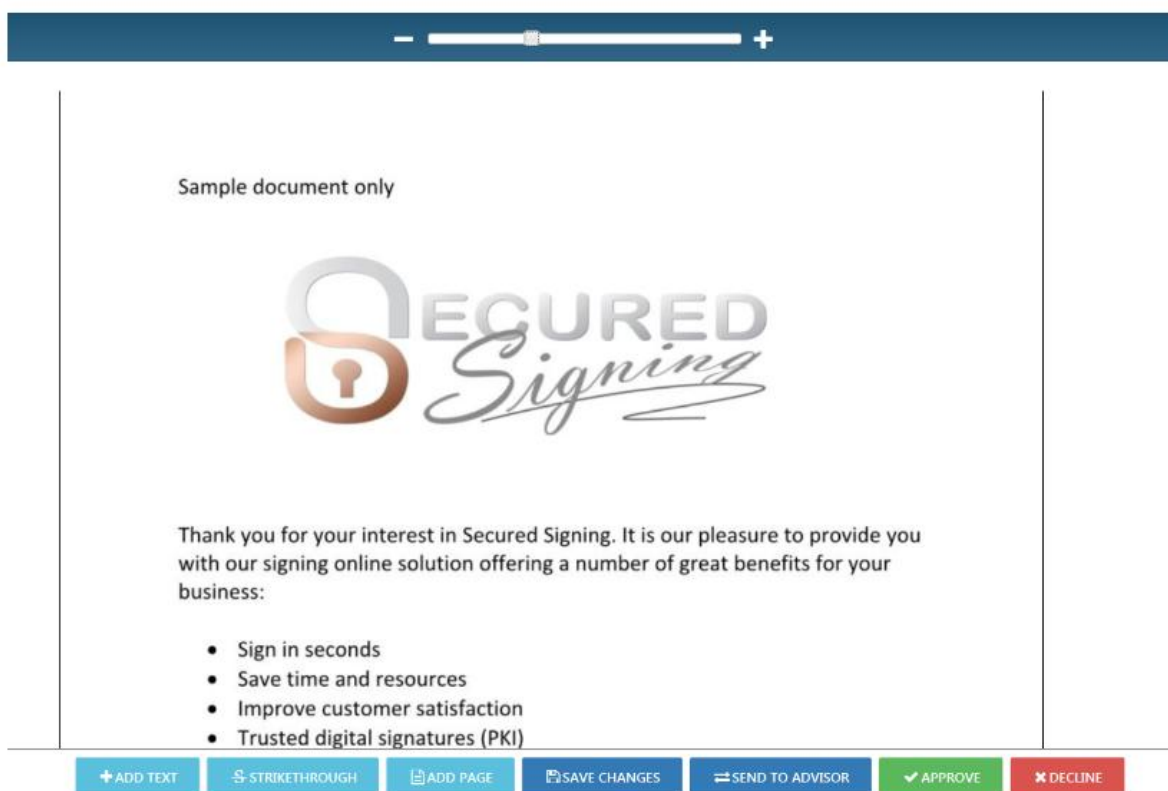
Stu Wood

Cancel Send

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

Invitees will be able to:

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



For more information, please watch the following videos:

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

### Effective Date

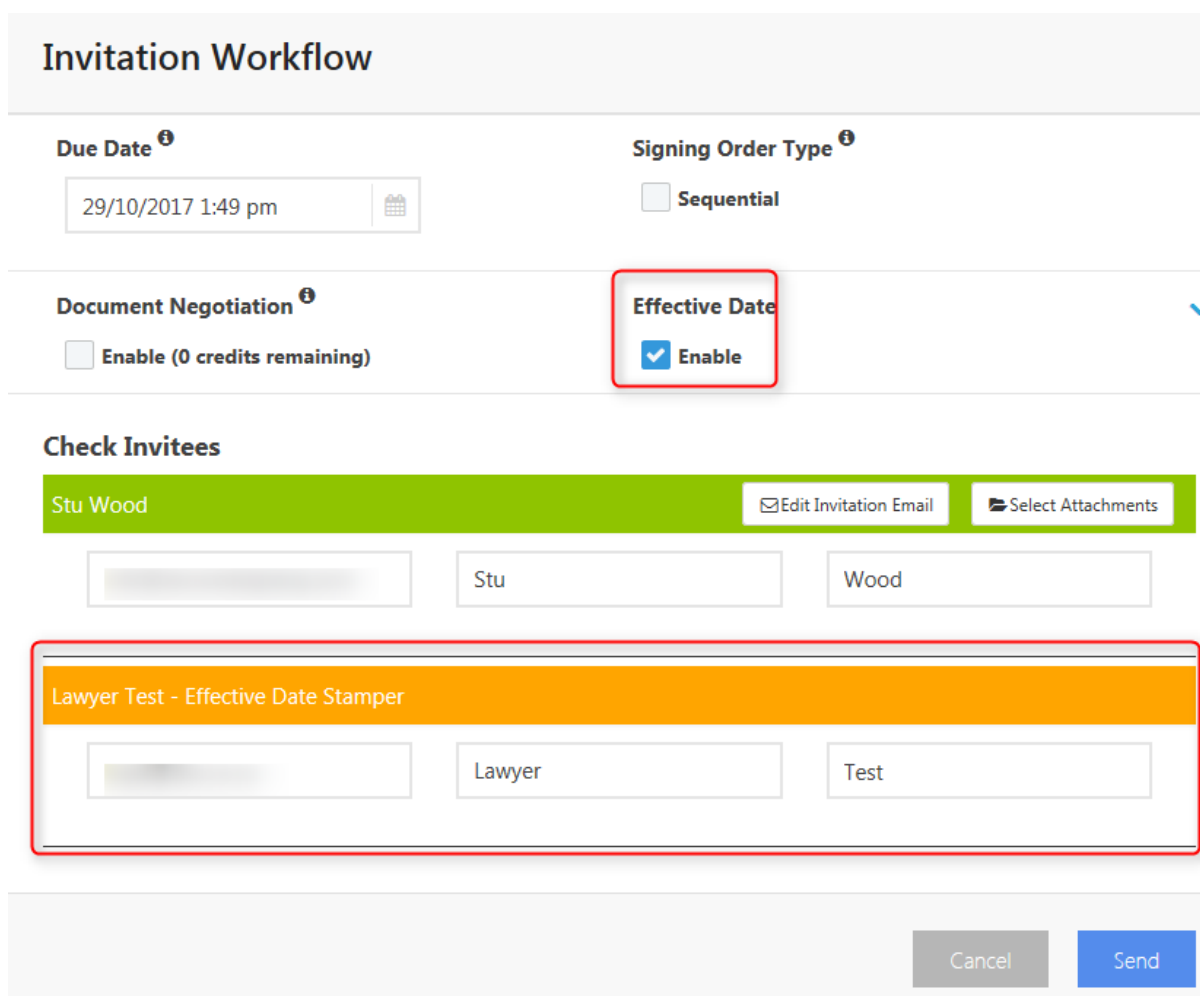
The legal industry needs to enter contract effective date after all signers signed. Entering effective date can be done by account owner or by inviting the lawyer to enter it at the end of the signing process.

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

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



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



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

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

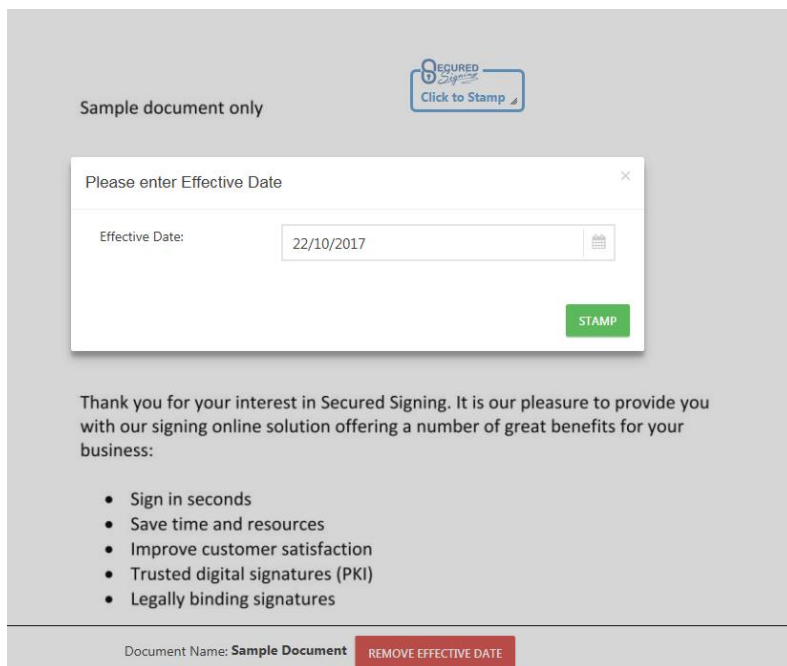
with our signing online solution offering a number of great benefits for your business:

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

Document Name: **Sample Document**

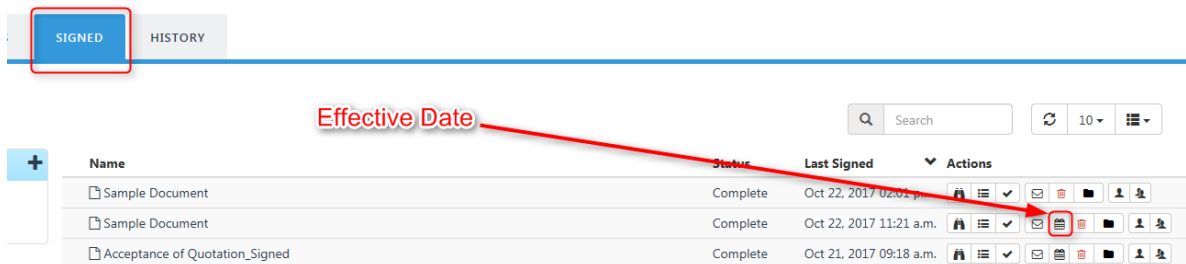
**ADD EFFECTIVE DATE**

Then stamping by entering the effective date.



After done all signers will receive email completion.

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



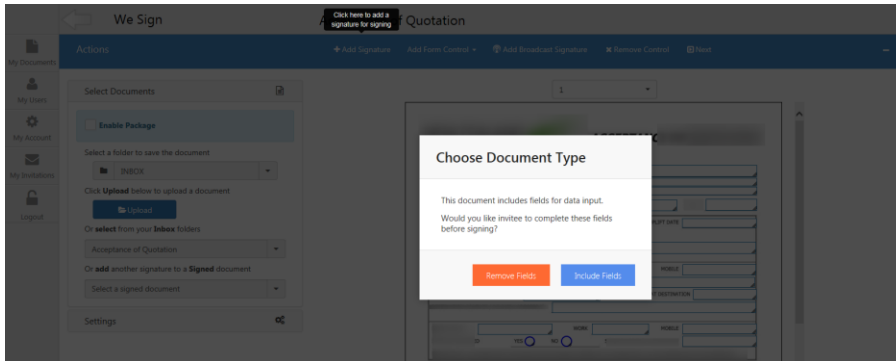
Please keep in mind the effective date is a digital signature field with a signature. This way it ensures all remaining signatures are valid.

### Disable Recognition of PDF Form Fields

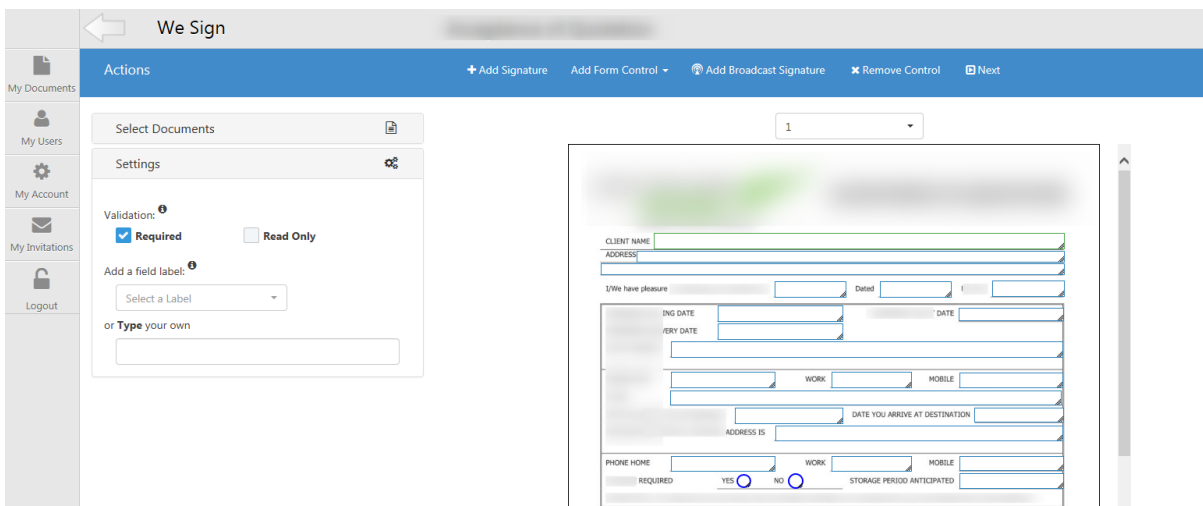
Now you can upload an editable PDF document in the We Sign and Form Filler functions. Secured Signing system will automatically recognise these fields and present them to be completed.

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

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



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

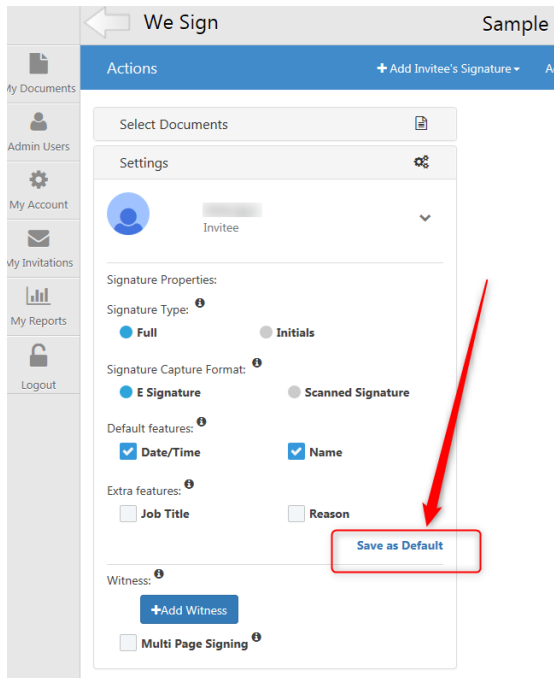


Secured Signing recognises the following form fields types:

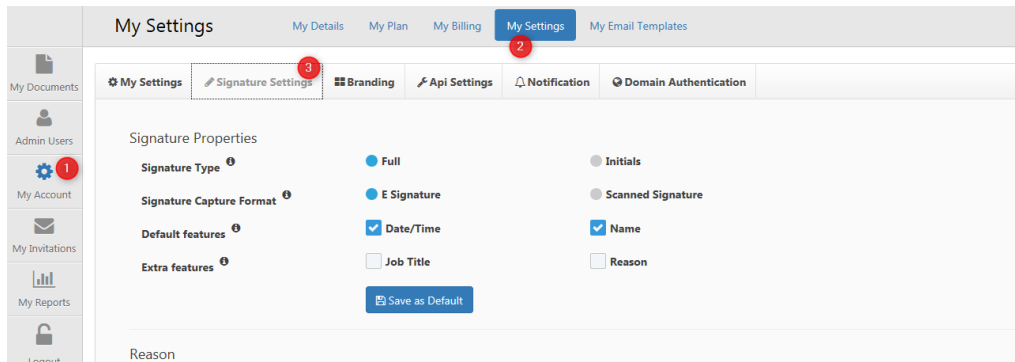
- Text box
- Multi line filed
- Check Box
- Radio Buttons
- Drop down fields with the values
- Date

## Signature Settings

Setup signature properties within the We Sign process.



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

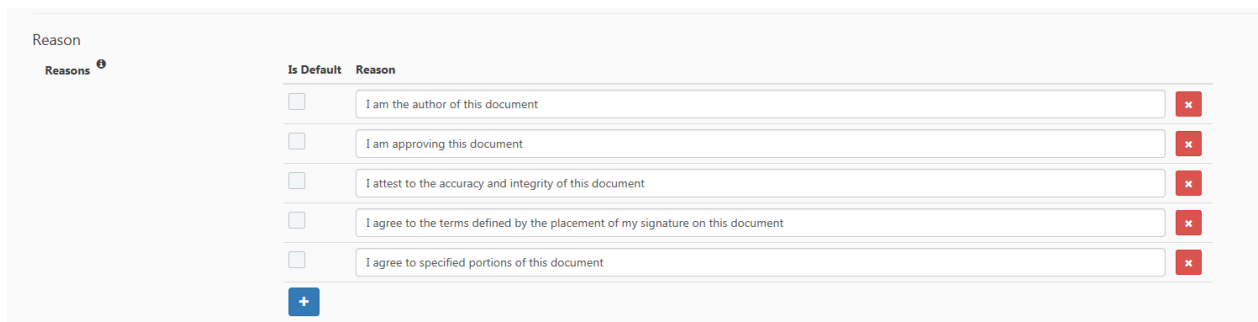


Once saved as default, all new WeSign process signature will have the same setting. Setup the Secured Signing platform to meet your signing needs.

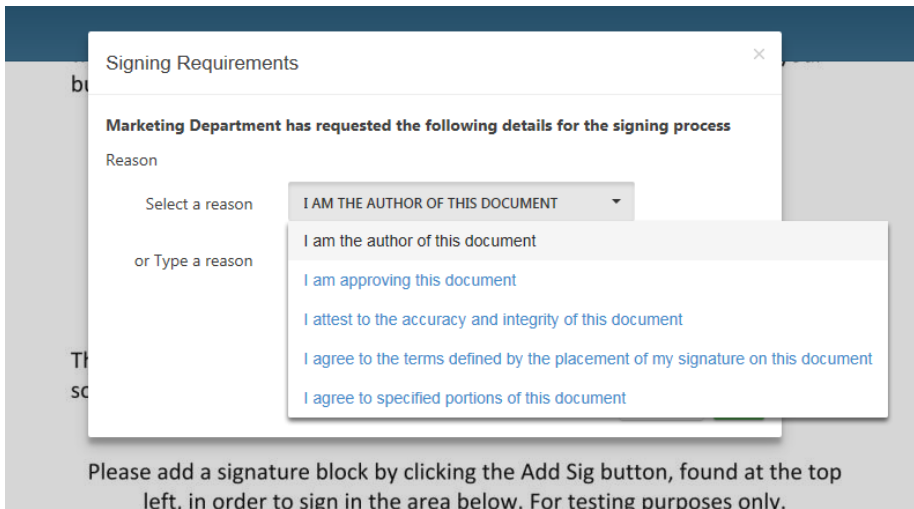
### Reason

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

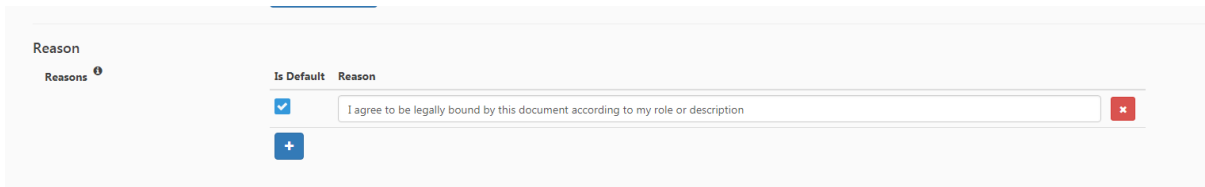
Build your customised list of reasons using this setup screen.



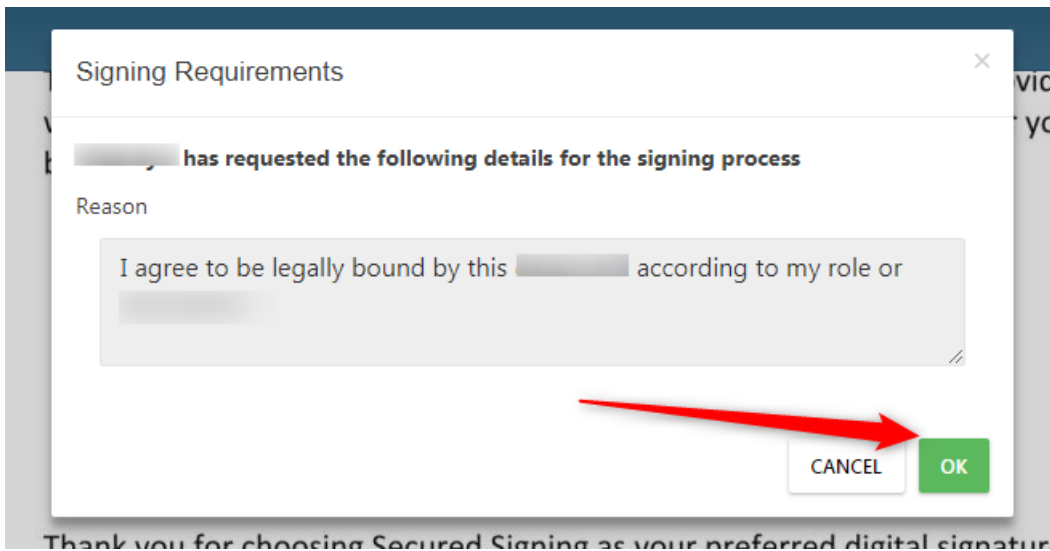
Invitee will see this during the signing process



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

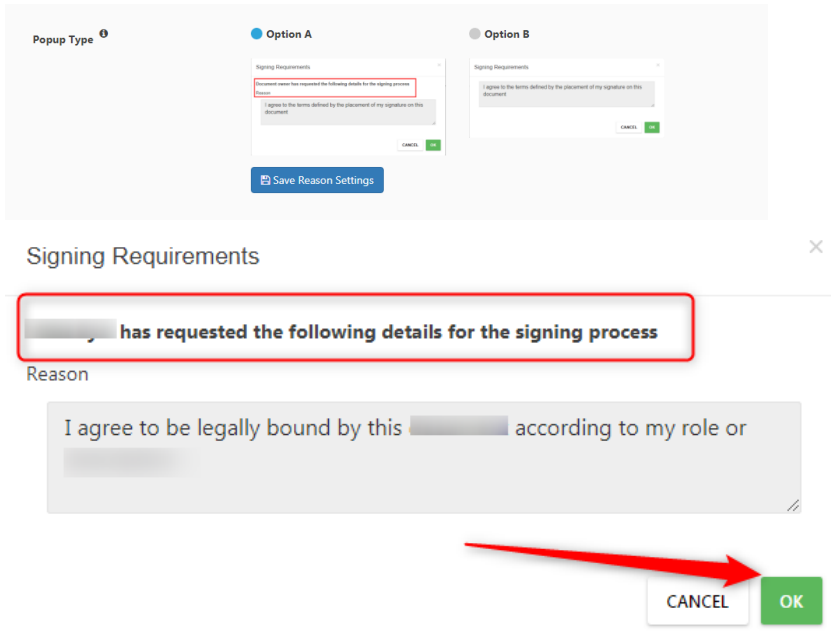


Invitee will see this popup while signing. Press ok in order to sign



### Pop-Up Type

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



### Signature Capture

#### Signature capturing method setup

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

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



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

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

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

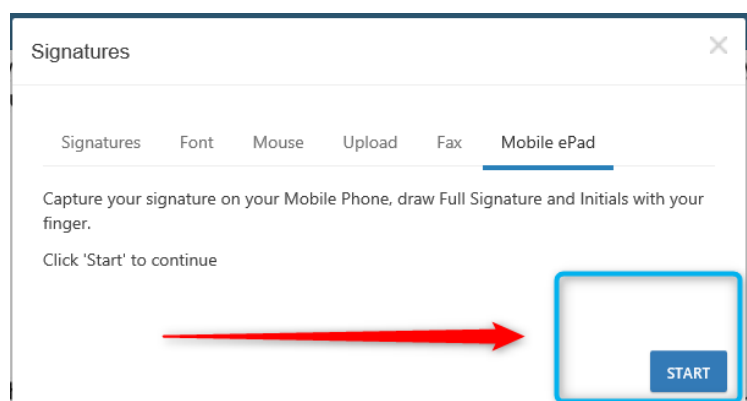
Mobile users can also click on My Signatures, from the left-hand menu. When they select this, they will view the same capture options as available to desktop users.

### Mobile ePad

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

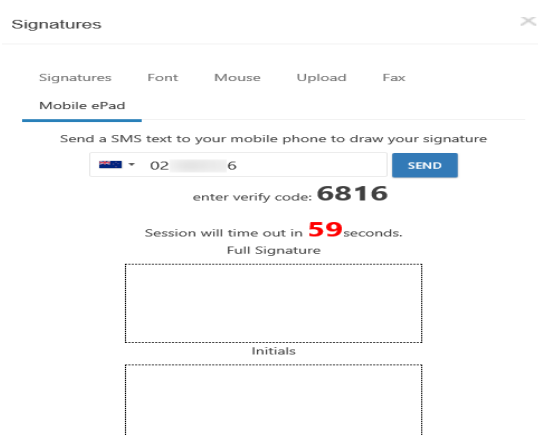
### How to use Mobile ePad?

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



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

### With SMS:

A screenshot of the "Signatures" interface, showing the SMS verification step. The "Mobile ePad" tab is selected. The text reads: "Send a SMS text to your mobile phone to draw your signature". Below this is a form with a dropdown menu showing a flag and "02", followed by a text input field containing "6" and a blue "SEND" button. Below the form, it says "enter verify code: 6816". A red "59" indicates the session will time out in 59 seconds. There are two dashed-line boxes for "Full Signature" and "Initials".

With a link:

Enter the link in the mobile’s phone browser.



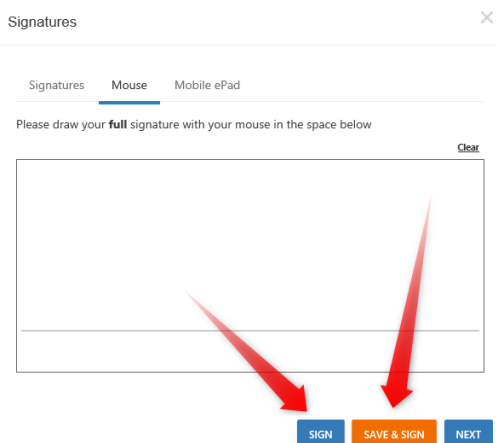
In both options you will be asked to enter a code to initiate the mobile ePad functionality.

Follow the instructions as prompted.

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

The Signer has the freedom to choose from:

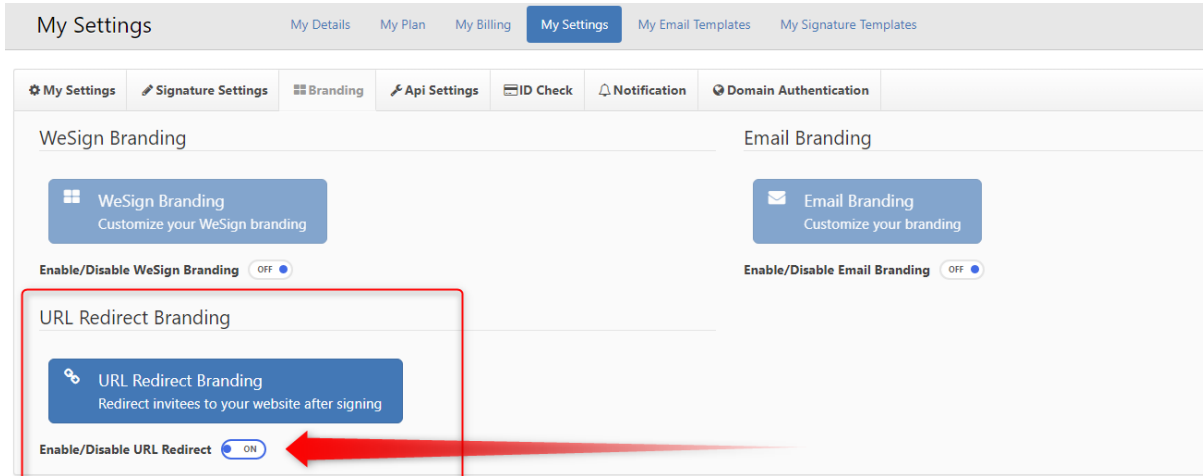
- Sign without saving their graphical signature images, next time they sign, will be required to capture signature image again.
- Save and Sign, means the graphical signature image will be saved in Secured Signing. You won't need to capture your signature again. Of course, you can delete your signature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



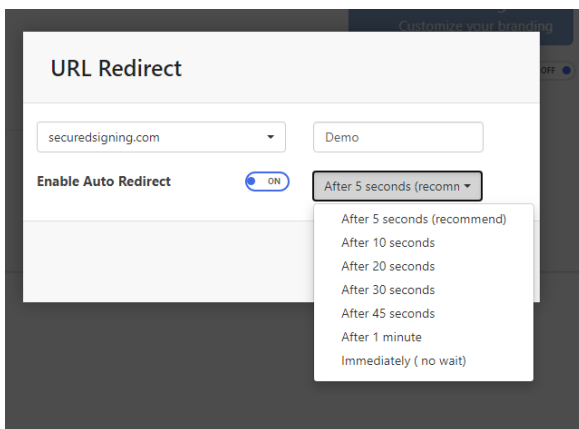
## Branding

### URL Redirect Branding

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



In order to be able to set up URL Redirect Branding you need first to setup domain authentication.



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

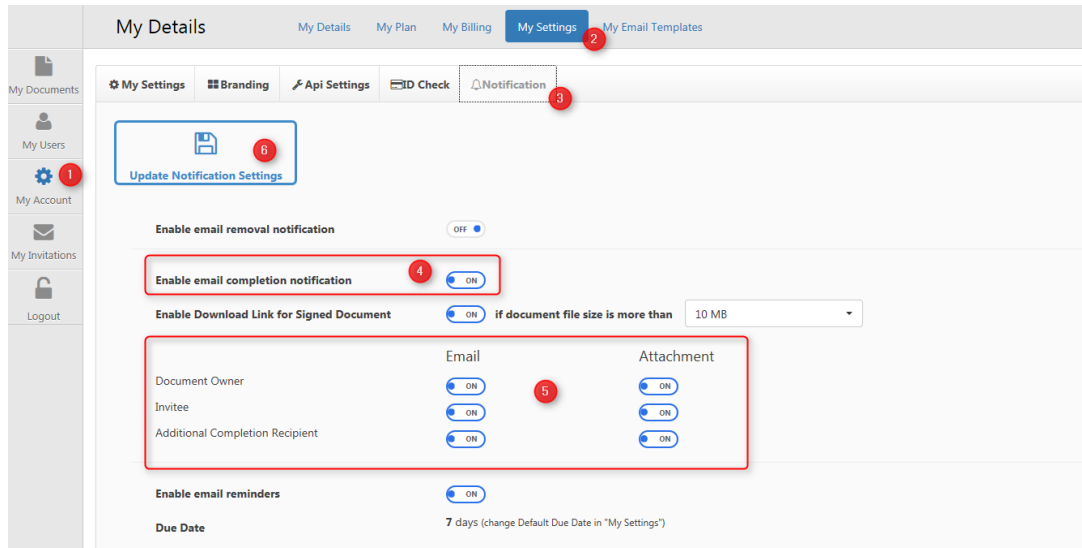
Once done click save.

## Notification

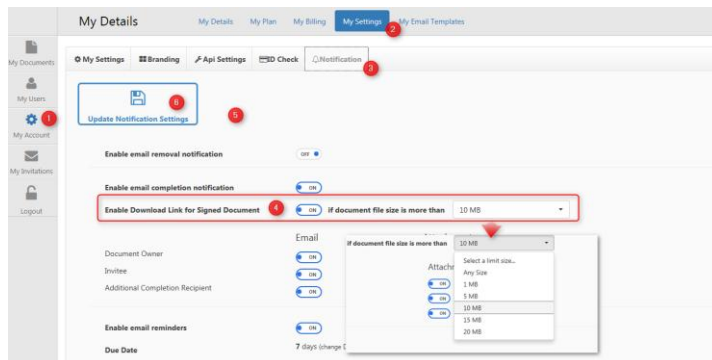
Secured Signing supports email completion set up. You can select which party will receive email completion and who will not.

Also, you can define if they email completion notification will include the document attachment or not.

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



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



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

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

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

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

## Domain Authentication

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

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

### My Settings – Domain Authentication - Press Add Domain

The screenshot shows the 'My Settings' page with the 'Domain Authentication' tab selected. A red arrow points to the 'Add Domain' button, and a red circle highlights the 'Domain Authentication' tab in the navigation menu. The page displays the following information:

- Domain:** securedsigning.com [verified]
- Instructions:** Authenticate securedsigning.com with Secured Signing by modifying your domain's DNS records. These changes allow your emails (invitations and reminders) to appear to come from securedsigning.com, instead of from our servers. After you've made the required DNS changes, please wait 24-48 hours for the changes to propagate.
- DKIM:** Create a CNAME record for `sslkey_domainkey.securedsigning.com` with this value:  
`sslkey.dkim.securedsigning.com`
- SPF:** Create a TXT record for securedsigning.com with this value:  
`v=spf1 include:spf.securedsigning.com -all`
- Alternative SPF:** Or if the SPF record is already existing for securedsigning.com, please merge this into the record value:  
`include:spf.securedsigning.com`
- Buttons:** Disable Authentication, Verify DNS Records, Remove Domain

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

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

**DKIM: Create a CNAME record for `sslkey._domainkey.your_domain` with this value:**  
`sslkey.dkim.securedsigning.com`

**SPF: Create a TXT record for your domain with this value:** `v=spf1 include:spf.securedsigning.com -all`

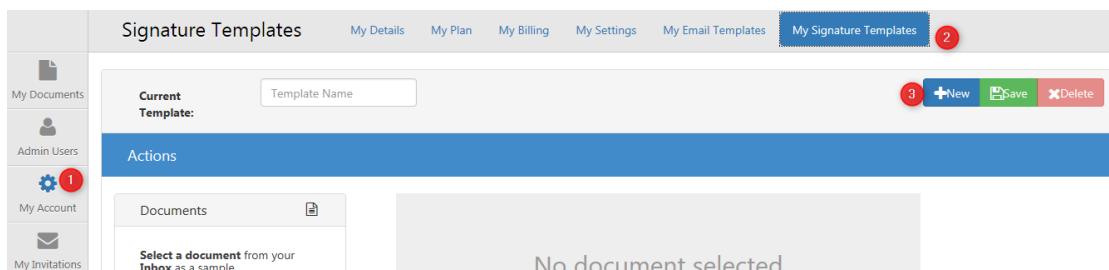
When completed, verify the domain and you email invitation delivery will improve.

## Signature Templates

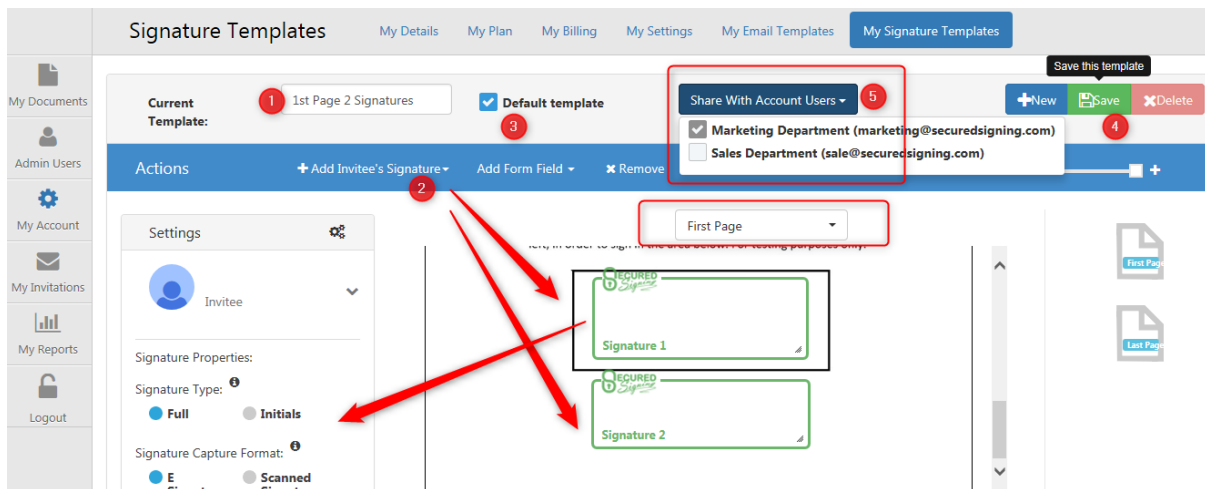
Automate your signing process and prepare your documents faster and easier to capture signatures. With our new Signature Template feature you can create a template for re-use where the signature position and other signature settings are saved as a template. This way you can simply select the template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

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

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



### How to design



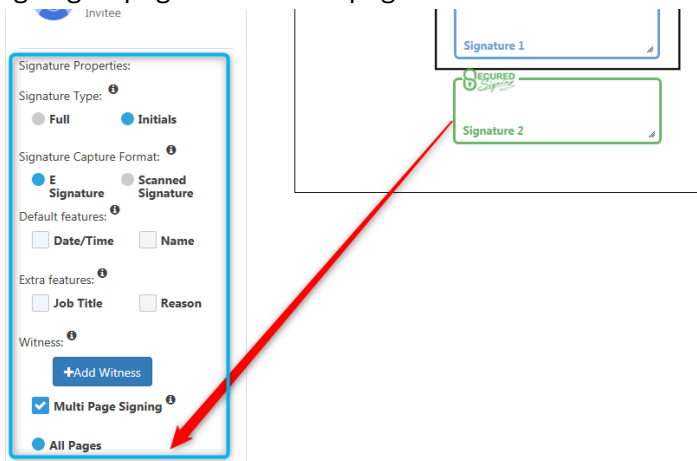
### How to build your Signature Template:

Select a document from your inbox.

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

Important Signature Template rules:

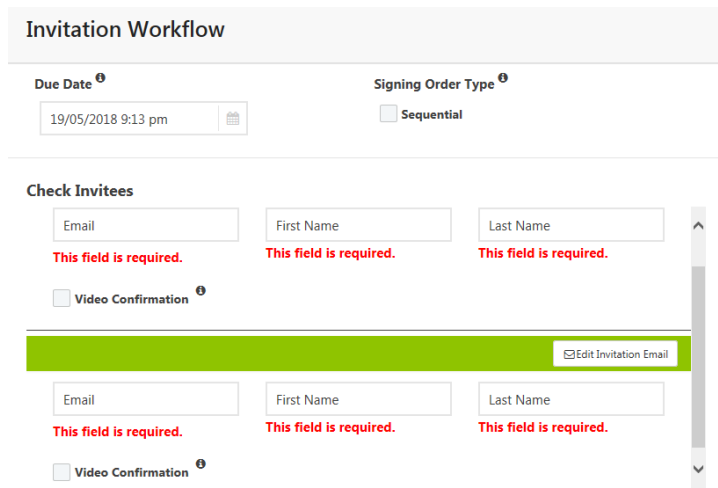
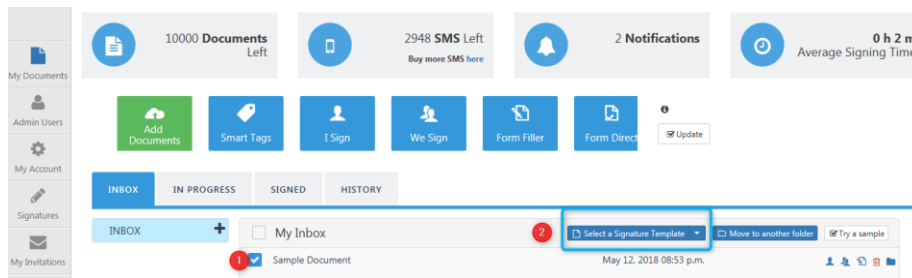
- When choosing signature position on first page, your documents should have at least one page. When selecting first and last page signature position, your documents should have at least two pages
- If selecting the Signature position in a specific page, for example on page 2 and page 4, all documents should have at least 4 pages, or on 1<sup>st</sup> page, page 2, and 4 and last page, all documents should have at least 5 pages.
- If Signature position should appear in all pages regardless, you need to select multipage signing all pages and tick all pages.



How does it work?

For We Sign – One Document

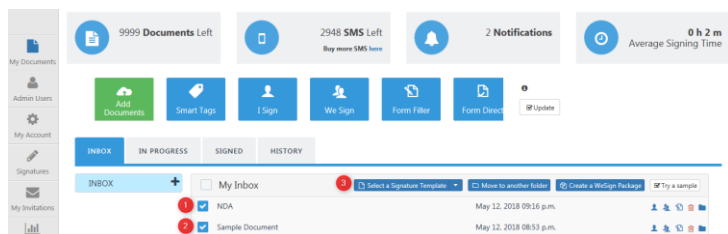
Start by ticking the document you want to sign (1) and select a Signature template (2)



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

For We Sign - Package

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



### Invitation Workflow

**Package** | Invitees | Documents

Signing Order Type ⓘ

Sequential

---

**Edit Invitation Email**

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

Video Confirmation ⓘ

---

**Edit Invitation Email**

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

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

# Signatures

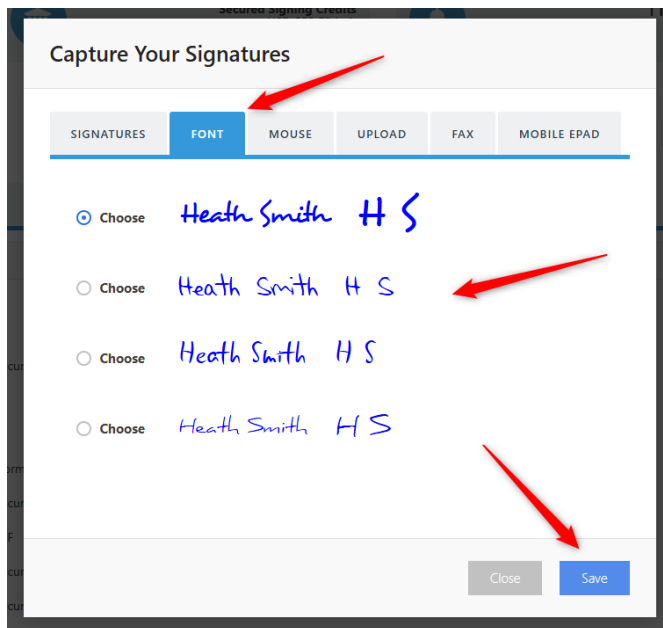
## Overview

Clicking the **Signatures** button in your Secured Signing account opens the ‘Capture Your Signatures’ pop-up, where you can see your saved signature, delete it, and save a new signature.

## Capture a Signature

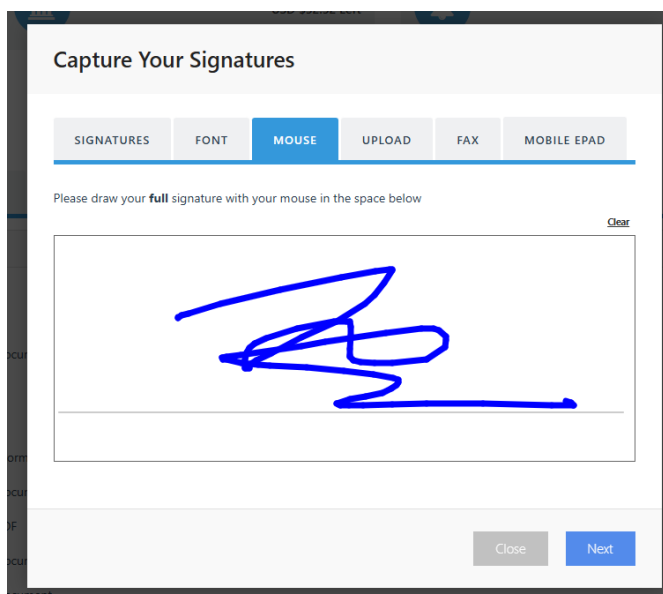
### Font

Select one of 4 different fonts with your name written out for your full signature, and your initials for your initial signature.



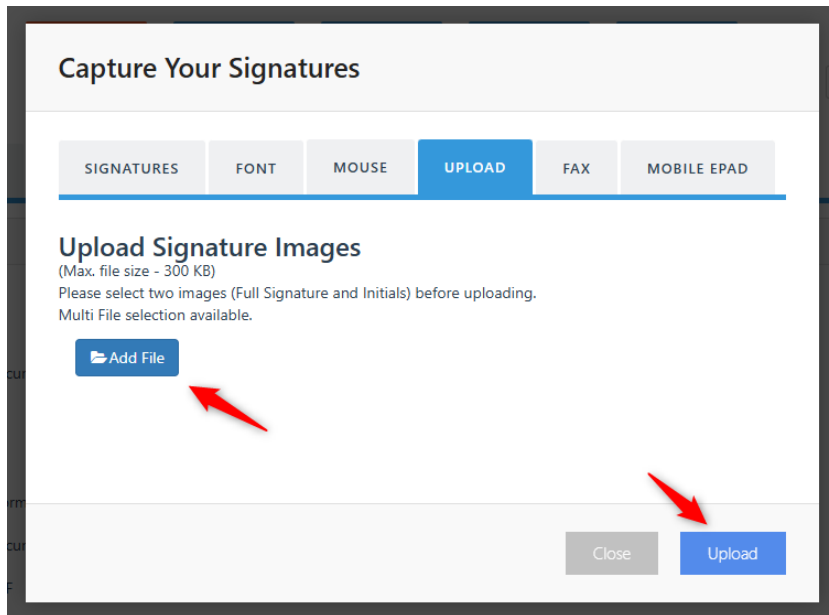
### Mouse

Draw your full signature and your initial signature with your mouse.



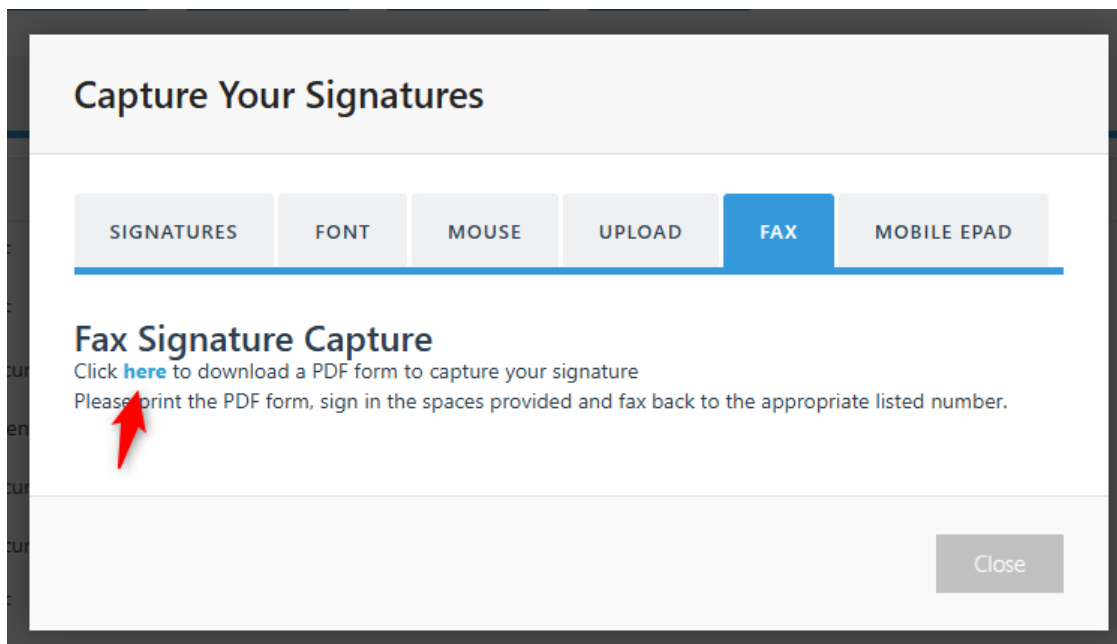
## Upload

Upload images of your full signature and your initial signature.



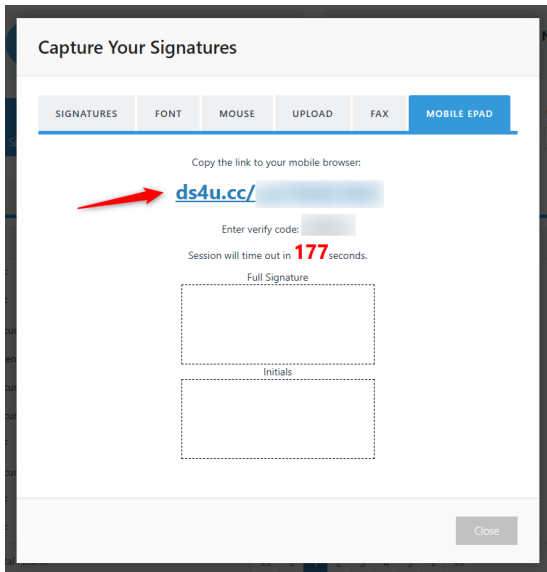
## Fax

Download a PDF, print it out and sign in the provided spaces, then fax it back to the appropriate listed number.



### Mobile ePad

Get a link to open on your mobile device, where you can draw your full signature and your initial signature.



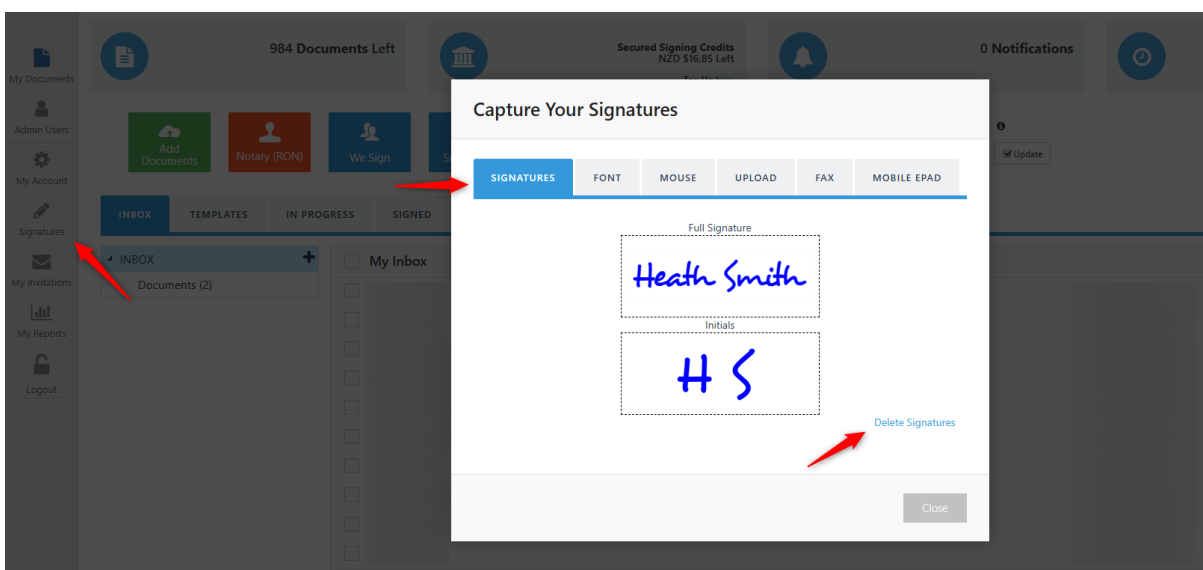
Draw your Full Signature in 50 seconds

CLEAR NEXT



### Delete Saved Signature

Login to Secured Signing, click the **Signatures** button on the left side of the page, then in the 'Signatures' tab of the 'Capture Your Signatures' pop-up, click the **Delete Signatures** text.



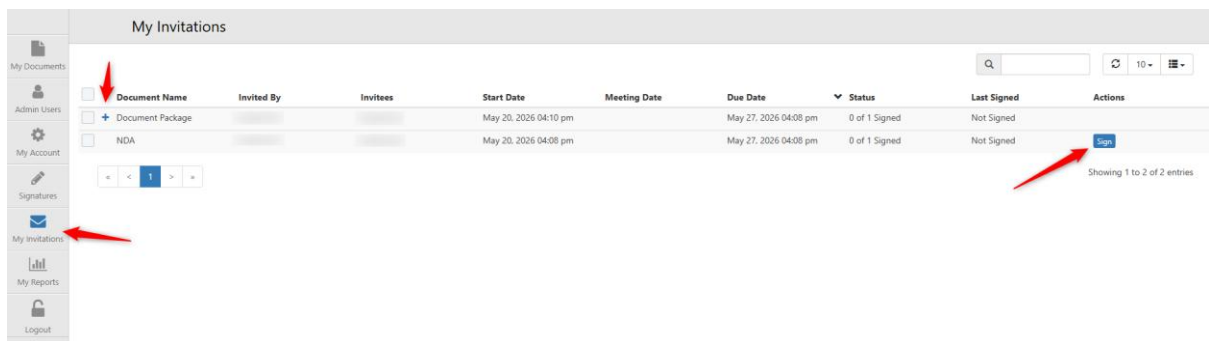
# My Invitations

## Overview

In the **My Invitations** page, you will see a list of the documents you have been invited to sign. From here you can see details such as who invited you, the start date, the meeting date for video signing or RON, and more. You can also access the document and sign from here.

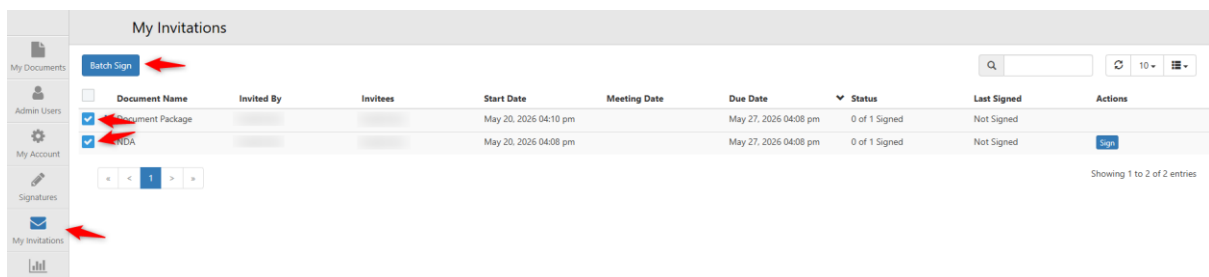
## Access a Document

If you have been invited to sign a document or a package of documents and you have a Secured Signing account, you can access the document(s) by logging in and going to the **My Invitations** page, then clicking the **Sign** button for a document. To see the **Sign** button for a document in a package, you will first have to click the **+** icon.



## Batch Sign Multiple Documents

If you want to sign multiple documents with a single click, go to the **My Invitations** page, select at least 2 documents, then click **Batch Sign**. You will be asked to capture a signature if you do not have one saved, and then all documents will be signed at once. Note that you cannot select documents that contain fields for batch signing, as you need to access the document to fill the fields.



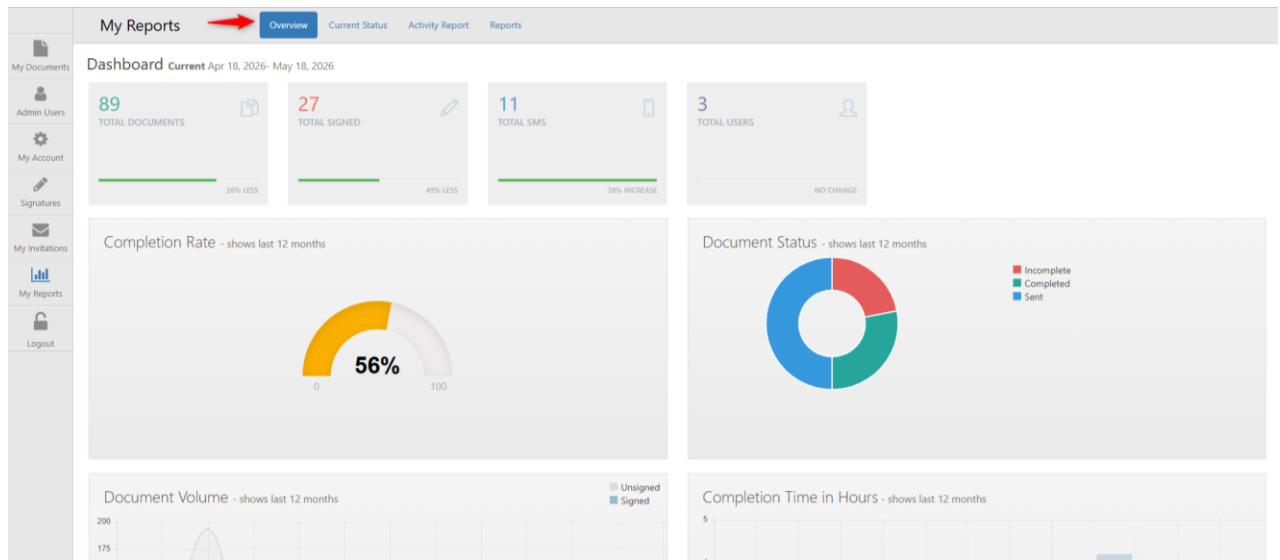
## My Reports

Admin users can run reports about all users within the account. Standard users can only run report for their own documents and activity.

### Overview

This is a global view of:

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



### Current Status

A quick look at the current number of documents per user in each signing stage; in the inbox, in progress, and completely signed.

The screenshot shows the 'Current Status' report with the following table:

Full Name	Email Address	Company Name	Inbox	In Progress	Signed
Ian Johnson		Secured Signing	5	0	0
Heath Smith		Secured Signing	184	1	4

Additional details: Search User, Show rows: 10

## Activity Report

Filter this report by date to get a quick summary of the number of documents per user that have been uploaded or submitted through Form Filler and Form Direct, the number of documents that have been deleted, and the number of documents in each signing stage; in progress and completely signed.

Full Name	Email Address	Company Name	Uploaded	Form Filler	Form Direct	Deleted	In Progress	Signed
Ian Johnson	j9@dsx.co.nz	Secured Signing	0	0	0	1	0	0
Heath Smith	j8@dsx.co.nz	Secured Signing	49	0	0	74	10	14

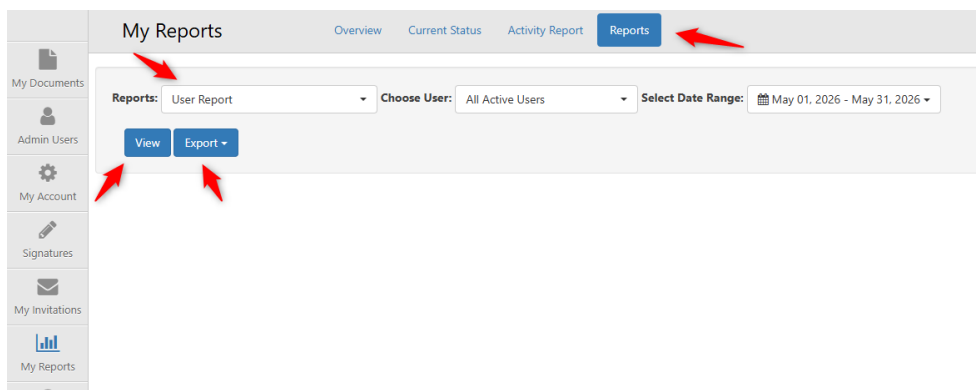
## Reports

Run reports, filtered by date, per user or for all users (available to admin users only), and export to a spreadsheet or PDF.

You can select a report from the ‘Reports’ dropdown, select a date range and choose which user(s) to see the report for, then click ‘View’ to generate the report. Select ‘pdf’ or ‘xlsx’ from the ‘Export’ dropdown to export the report to your device.

The currently available reports are:

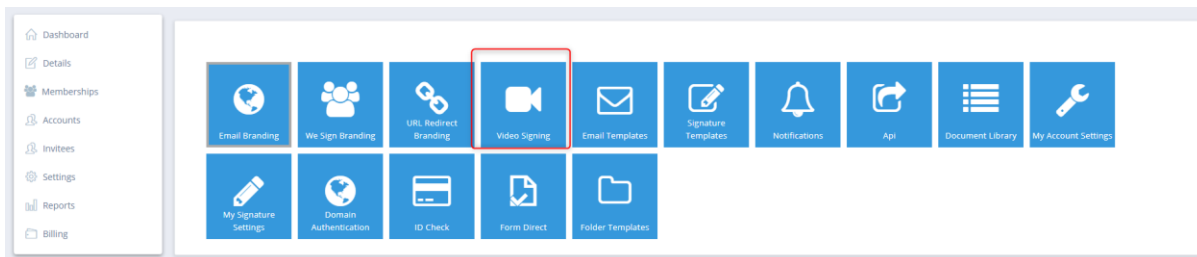
- User Report
- Invitee Report
- Document Report
- Activity Report
- Expired Documents Report
- Witness Report
- SMS Report
- Detailed Documents Report
- Email Bounce Report
- Upload and Submitted Documents Report
- Electronic Notary Journal
- RON Cost Summary
- Exported Form Field Data
- Signed Completion Report



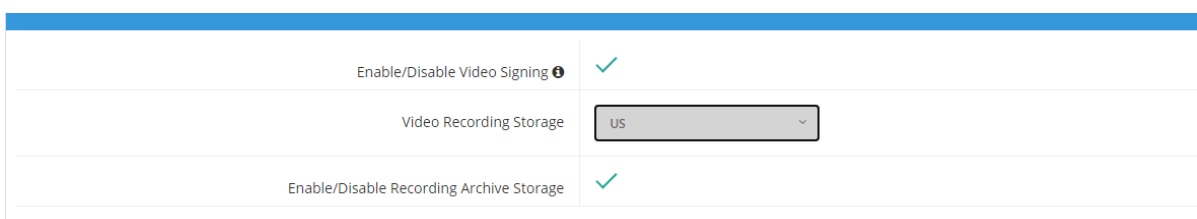
# Enterprise Admin Portal

## Video Signing Settings

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



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



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

Video signing supports from 1 up to 50 participants.

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

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

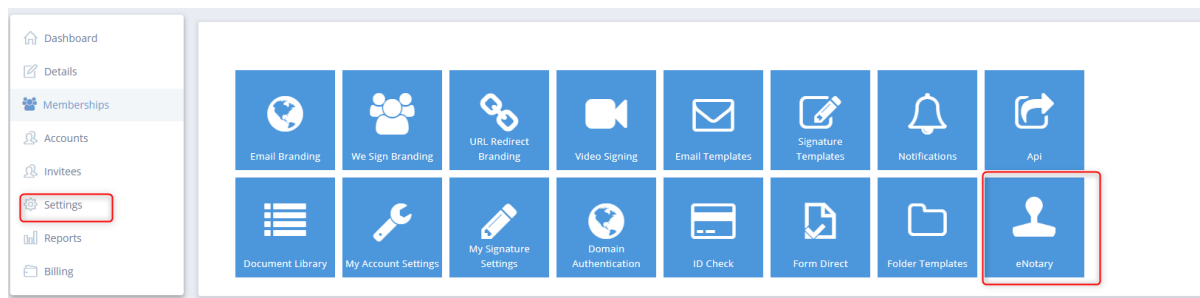
You can invite guests who are not needed to sign but can support the signer in the video meeting.

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

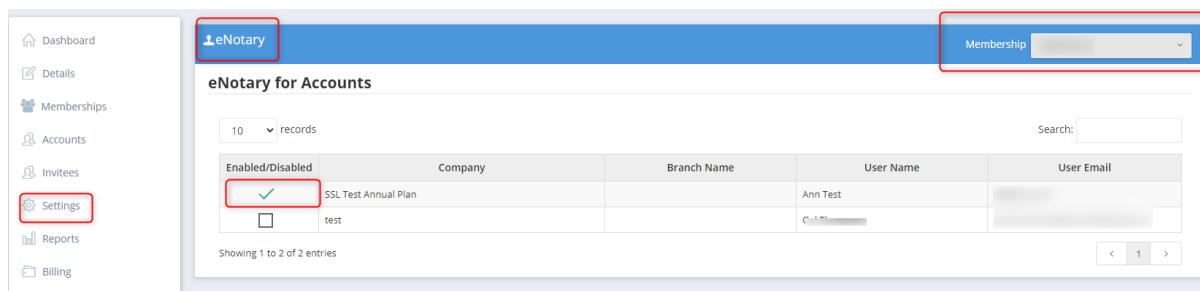
Video signing’s cost is on top of the document usage and users plan.

## eNotary

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



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



## Notary Queues

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

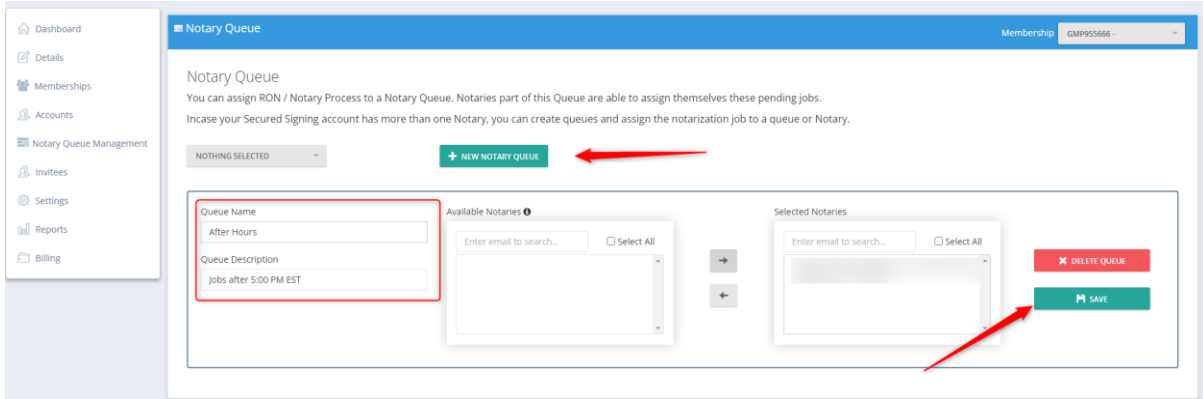
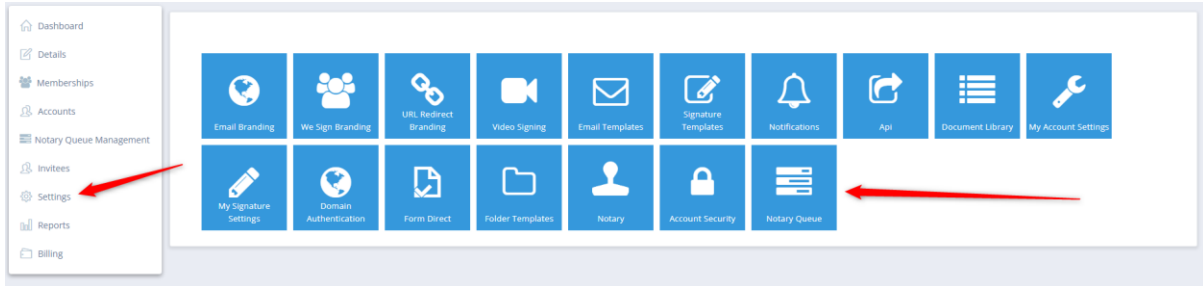
The new feature supports the ability to have different roles/people assigned to the document that can prepare and tag as needed, a meeting host and a notary. The feature also allows for the company to run the notary signing service within the queue feature.

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

### Notary Queue Set Up

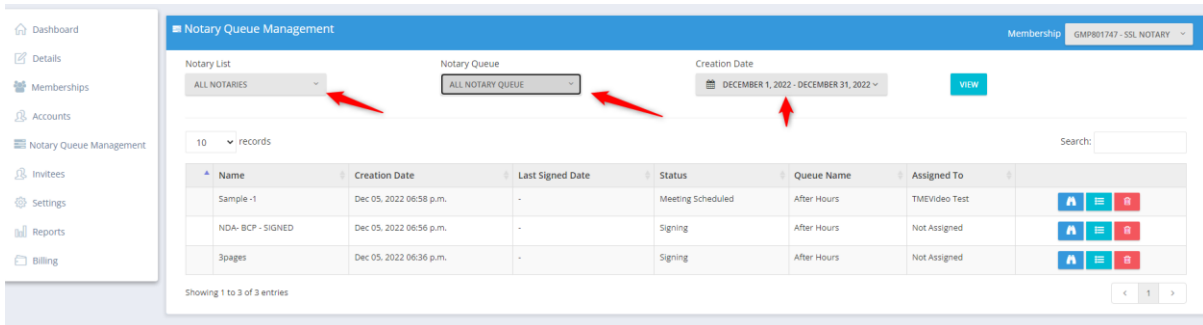
Enterprise account (unlimited number of users/notaries) plan can setup unlimited queues and can assign available notaries to the queue.

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



### Notary Queue Management

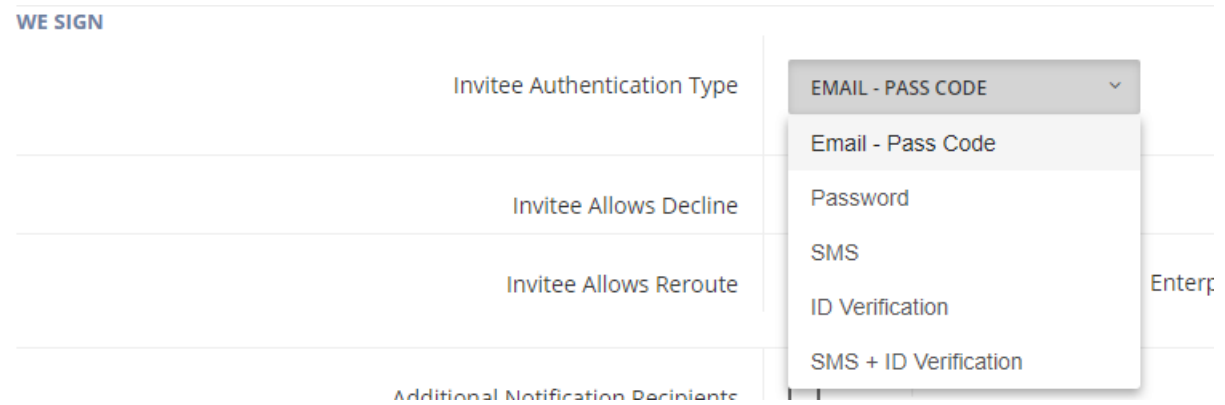
Admin users within a Team or Enterprise account plan have full visibility and control of the notary queues. The admin or those assigned in a queue have visibility of the queue for management and monitoring of the process, ensuring all submitted requests are fulfilled!



## Invitee Authentication Type

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

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



The screenshot shows the 'WE SIGN' settings page. The 'Invitee Authentication Type' dropdown menu is open, displaying the following options: EMAIL - PASS CODE (selected), Email - Pass Code, Password, SMS, ID Verification, and SMS + ID Verification. Other settings visible include 'Invitee Allows Decline', 'Invitee Allows Reroute', and 'Additional Notification Recipients'.

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

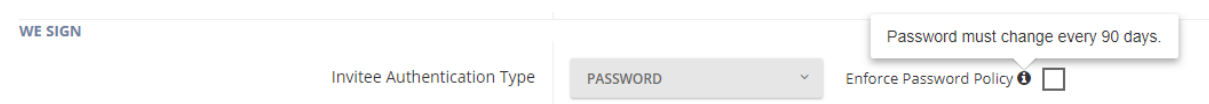
Video Confirmation it is additional way to know who was behind the device at the signature moment

### Email / Passcode

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

### Password

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



The screenshot shows the 'WE SIGN' settings page with the 'Invitee Authentication Type' dropdown menu set to 'PASSWORD'. A tooltip message states 'Password must change every 90 days.' and there is a checkbox for 'Enforce Password Policy'.

### SMS

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

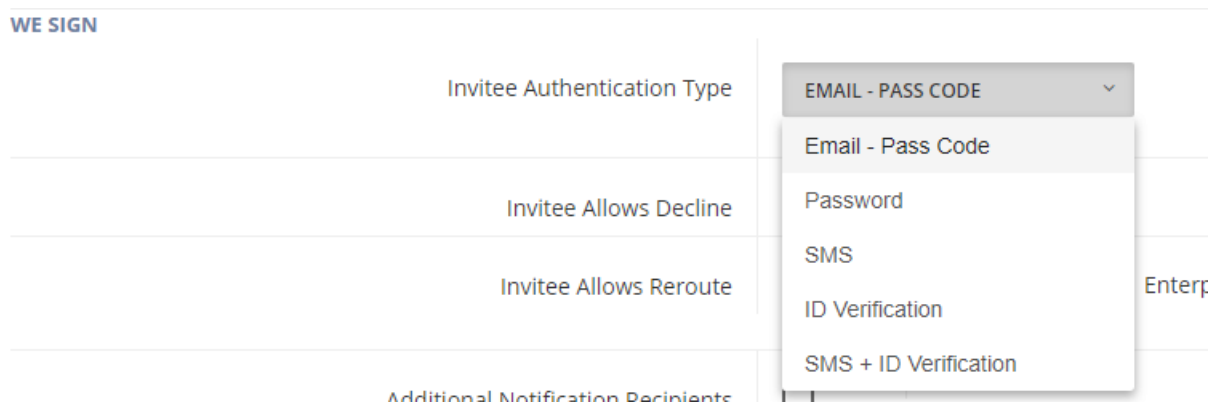
### ID Verification

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

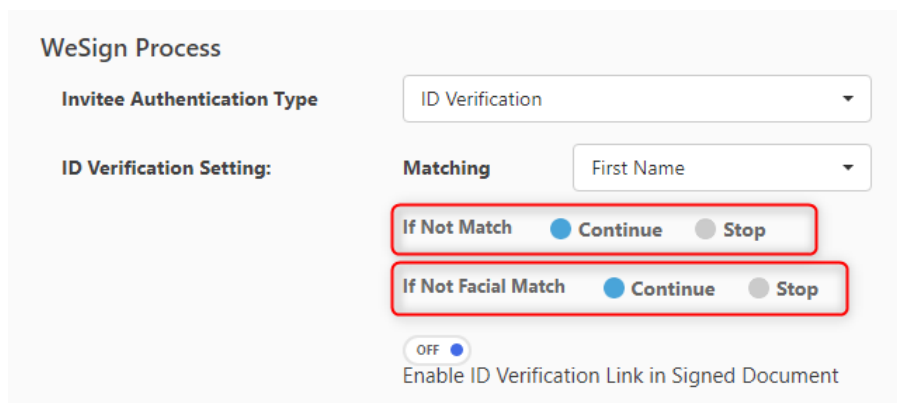
The Facial matching software performs powerful biometric facial recognition match and liveness detection to prevent identity theft and fraud. A user simply captures an image of their government issued ID and then takes a selfie. The selfie image is compared to an extracted

photo from the identity document such as a driver’s license or passport to verify a match and provide a confidence score. NIST tested algorithm for biometric facial recognition match with optional advanced passive liveness test which requires no action and is iBeta compliant. Prevents presentation attacks from printed images, masks, recorded video or synthetic video.

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



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



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

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

### Invitation Workflow

**Due Date** <sup>?</sup>

**Signing Order Type** <sup>?</sup>  Sequential

**Video Signing**  Enable ▼

#### Check Invitees

LORRAIN ADORNATO Edit Invitation Email

Authentication: ID Verification

Matching: First Name  **If not Match**  Continue  Stop

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

Video Confirmation <sup>?</sup>  Face2Face Sign

## Knowledge Base Authentication

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

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

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

## User Grouping

The hierarchy structure for an Enterprise account is:

**Membership** - Company Name



**Group** - Head office



**Sub Group** - Finance



**User 1**

**User 2**

**User 3**

Membership level is the enterprise account for a company or a brand.

You can have more than one membership account for each of your brands or companies within a group of companies.

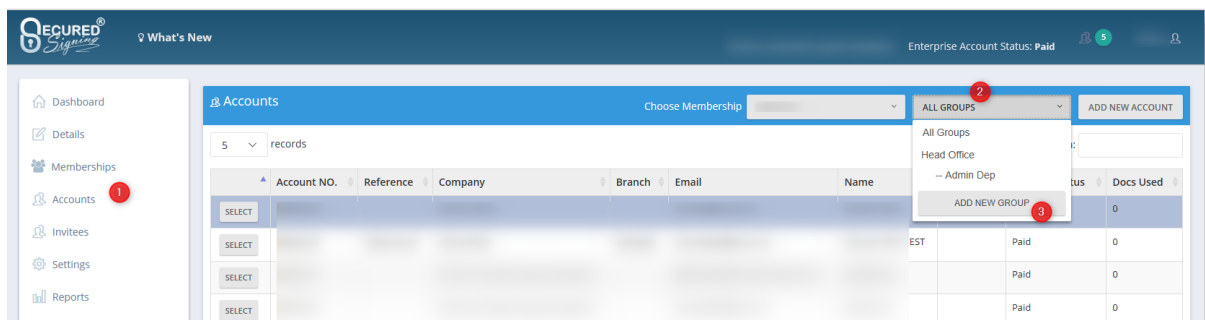
To add more membership accounts please contact Secured Signing Support.

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

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

Each account can belong to more than one group.

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



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

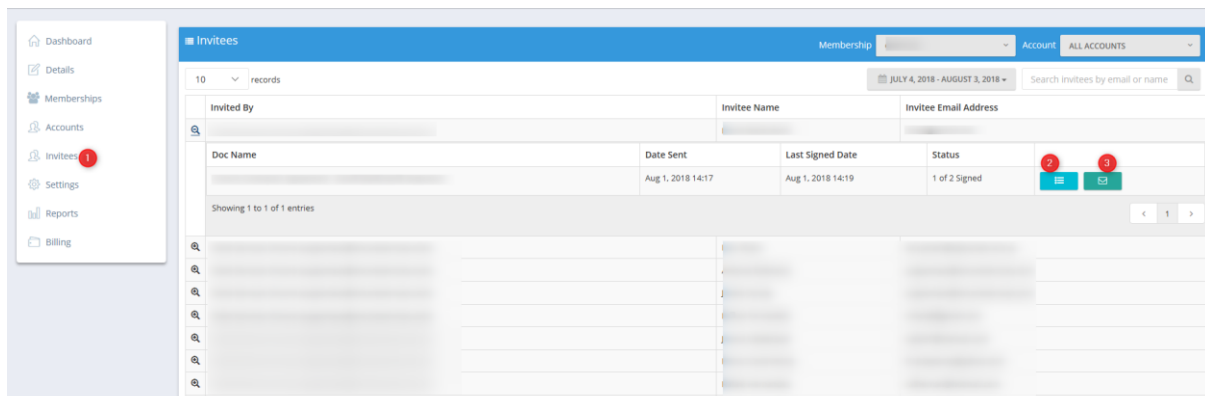
Legal Name *	<input type="text"/>	First Name	OnCore	Street 2	<input type="text" value="Great"/>
Company Website	<input type="text"/>	Middle Name		City *	<input type="text" value="Nice"/>
Account Number	<input type="text"/>	Last Name	Test	Postal/Zip Code	<input type="text" value="8888"/>
Share Form Filler templates	<input type="text" value="NOTHING SELECTED"/> <input type="button" value="SHARE TEMPLATE"/>	Job Title	<input type="text" value="QA"/>	Country *	Australia
Delete Form Filler templates	<input type="text" value="NOTHING SELECTED"/> <input type="button" value="DELETE TEMPLATE"/>	Groups	<input type="text" value="HEAD OFFICE, ADMIN DEP"/> <input checked="" type="checkbox"/> Head Office <input checked="" type="checkbox"/> Admin Dep	State *	QLD
Branch Name	<input type="text"/>			Phone *	<input type="text" value="45456565"/> <small>e.g: 2 3023 4940</small>
Account Ref.	<input type="text"/>				
Email Address	<input type="text"/>				
Password	<input type="text"/> <input type="button" value="RESET PASSWORD"/>				
Account Status	Paid Account				



2

## Invitee Tool

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



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

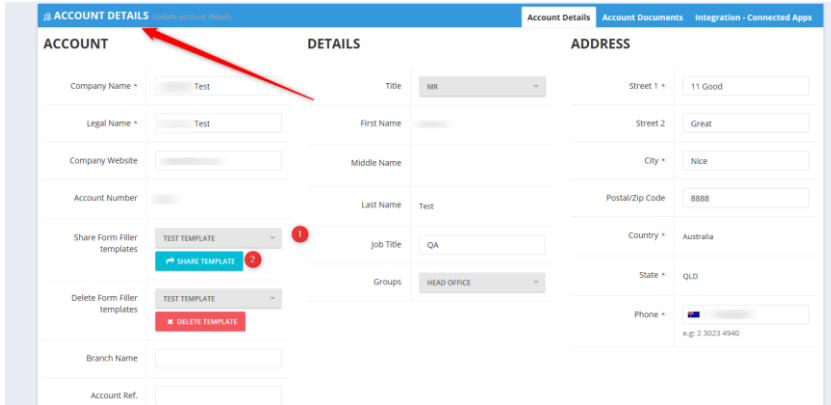
## Form Filler

### Share Template

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

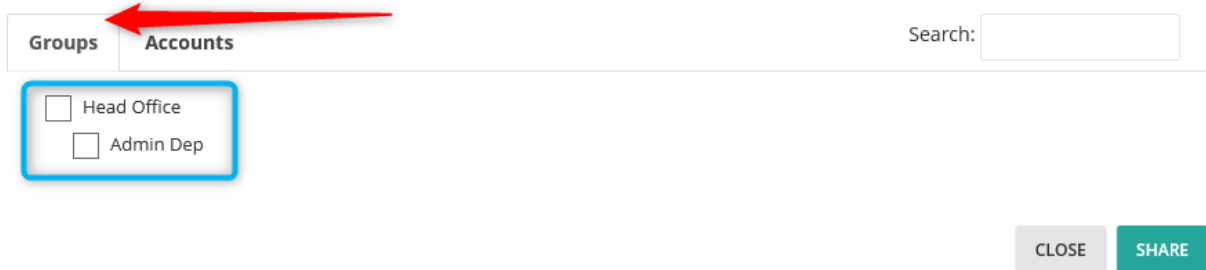
First create the template in user's account by using Form Filler.

In admin portal select the template owner account in Accounts page

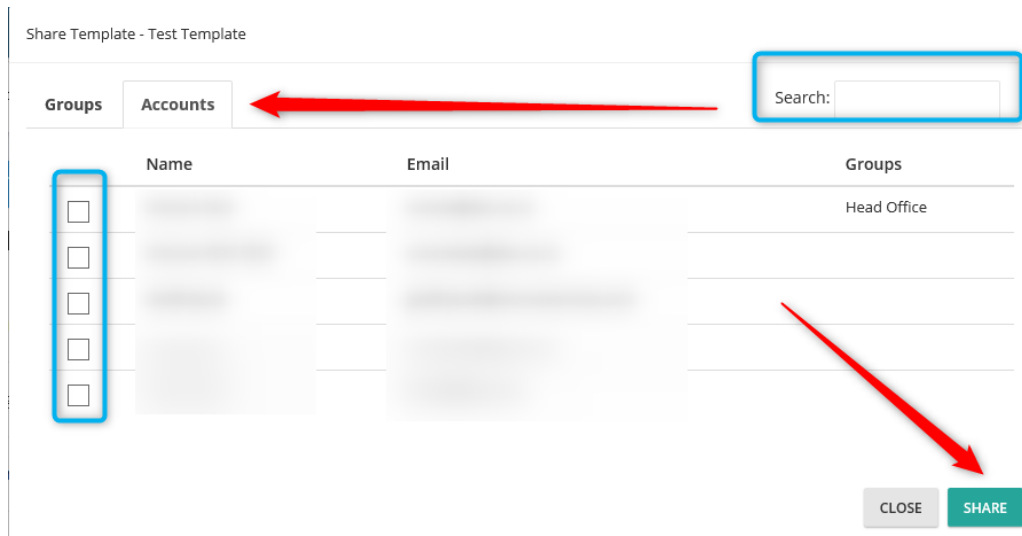


Select the group to apply all accounts in the group

Share Template - Test Template



Or select specific account and share.



## Delete Template

Admin users in Enterprise Admin Portal can delete templates by:

Go to Accounts-> select the accounts / user who is the template owner -> and then select the template that needs to be deleted. Prese delete, and it's done.

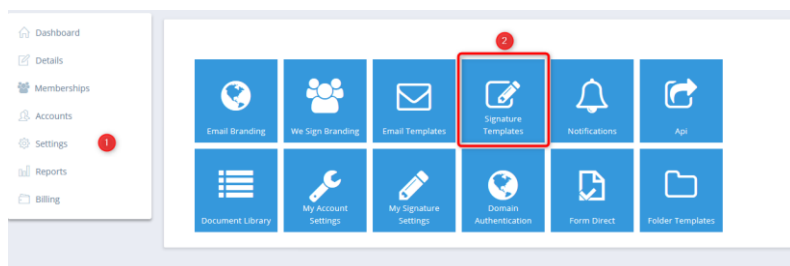
ACCOUNT	DETAILS	ADDRESS
Company Name *	Title MR	Street 1 * 11 Good
Legal Name *	First Name	Street 2 Great
Company Website	Middle Name	City * Nice
Account Number	Last Name Test	Postal/Zip Code 8888
Share Form Filler templates	Job Title QA	Country * Australia
TEST TEMPLATE	Groups HEAD OFFICE	State * QLD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

## Signature Template

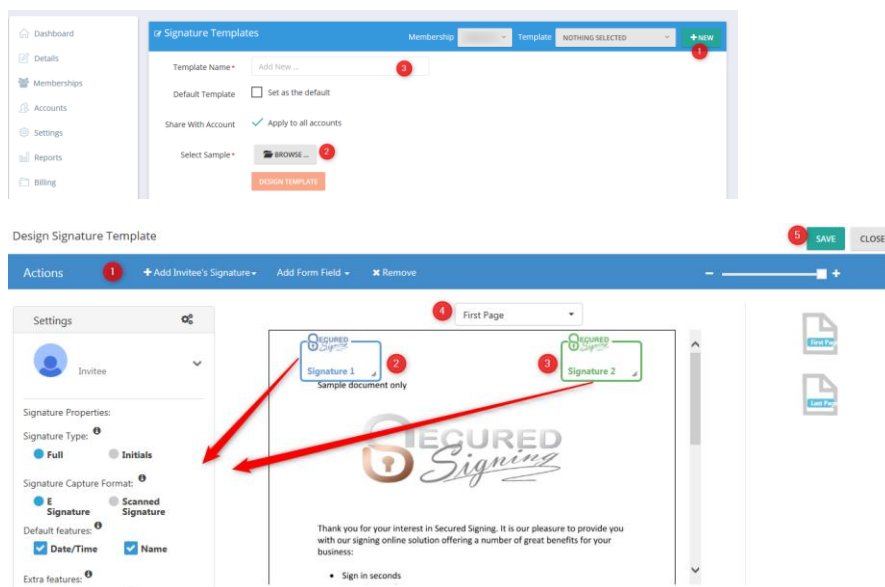
We are always looking for a way how Secured Signing can automate the signing process and make the document preparation faster and easier. Signature Template allows you to apply signature position template to a document or bunch of documents in package, just add invitee’s details and press send. No spending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

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

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



### How to design signature template



### Steps to build a template

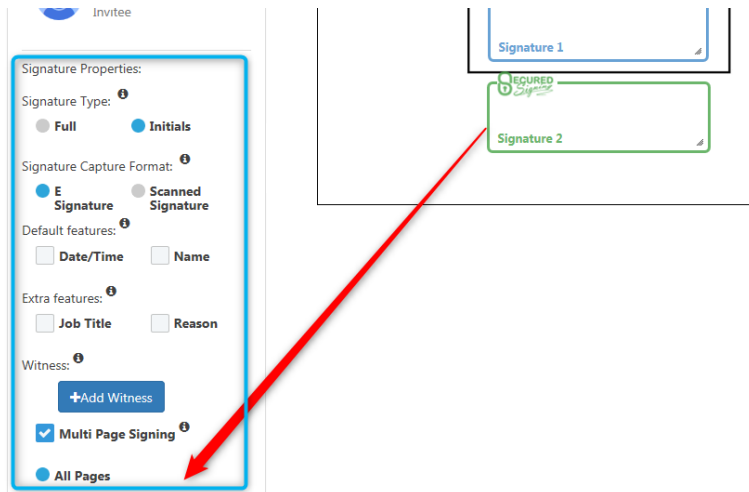
First of all select a document from inbox.

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

### Template signature rules:

- First page all documents should have at least one page
- First and last page all documents should have at least two pages
- Signature in specific page, for example on page 2 and page 4, all documents should have at least 4 pages, or on 1<sup>st</sup> page, page 2, and 4 and last page, all documents should have at least 5 pages.

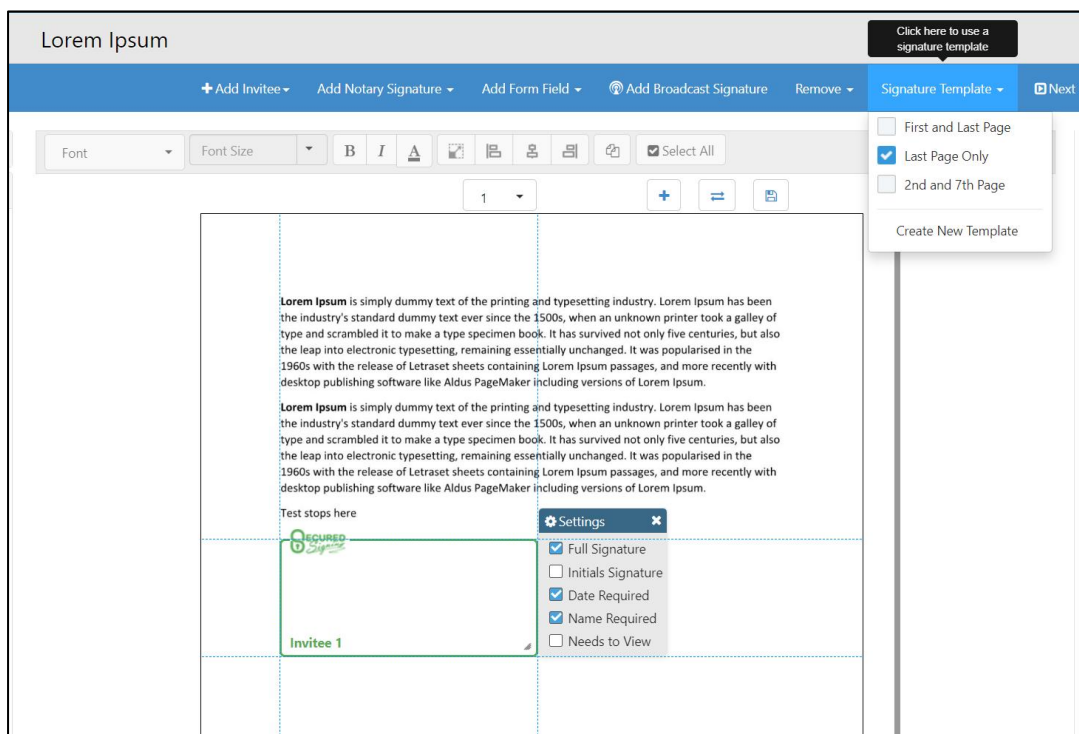
Signature should appear in all pages regardless number of pages you need to select multipage signing all pages, you can have any number of pages in any document. Signature should be in any page.



## Applying Signature Template

### In Document Editor

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

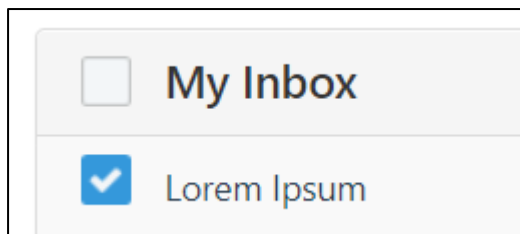


Selecting a template will apply it to the current document where you are able to make further changes before sending it to the invitees.

### Inbox

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

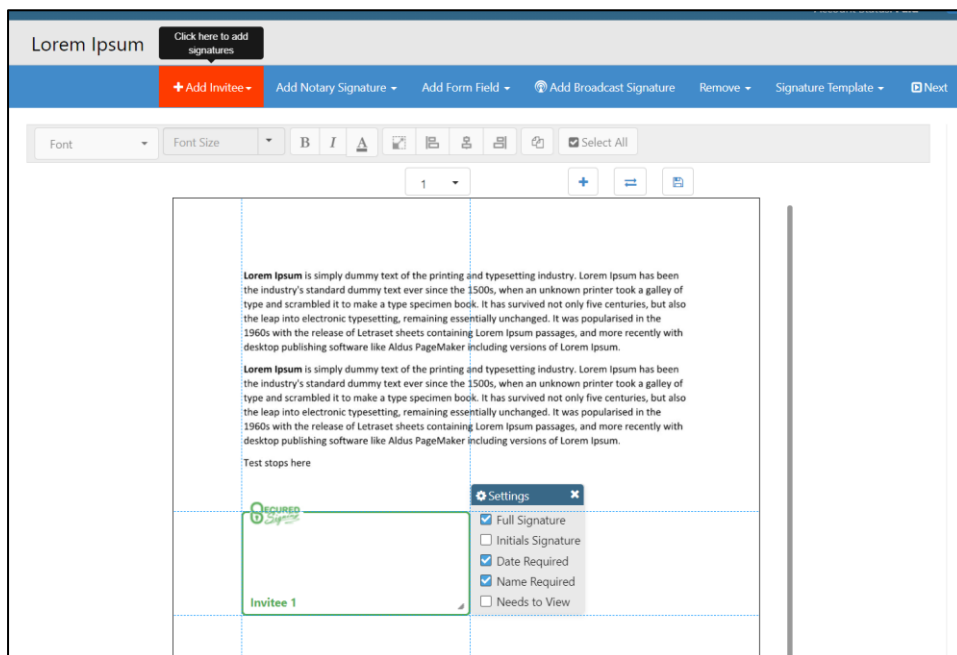
1. Select the document in “My Inbox”



2. Select the option “Select a Signature Template”



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

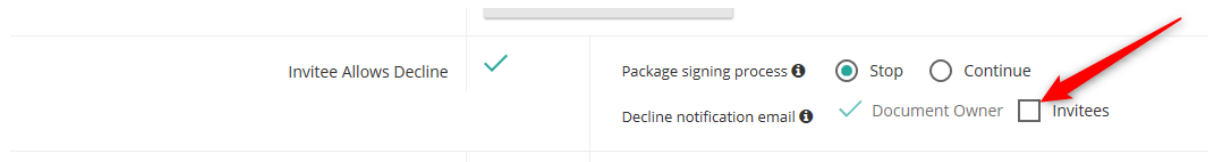


## Invitee Allows Decline

### Email Decline notification

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

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



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

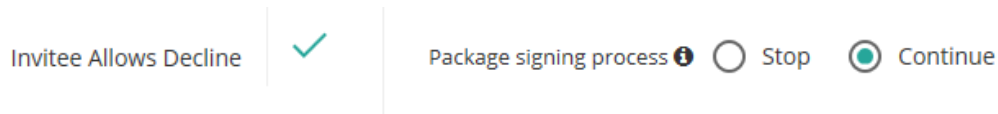
### Decline Continue in package

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

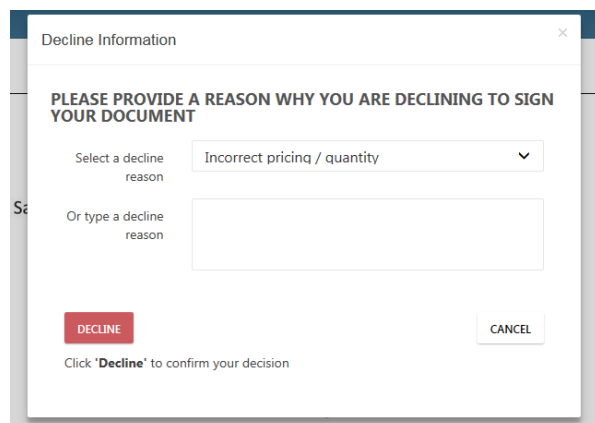
Once document has been declined by one of the invitees the other will be able to view it in the signing process but can't sign this document anymore, the signing process for this particular document in the package is stopped but all other documents in the package continue the signing process.

How to set it up

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



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



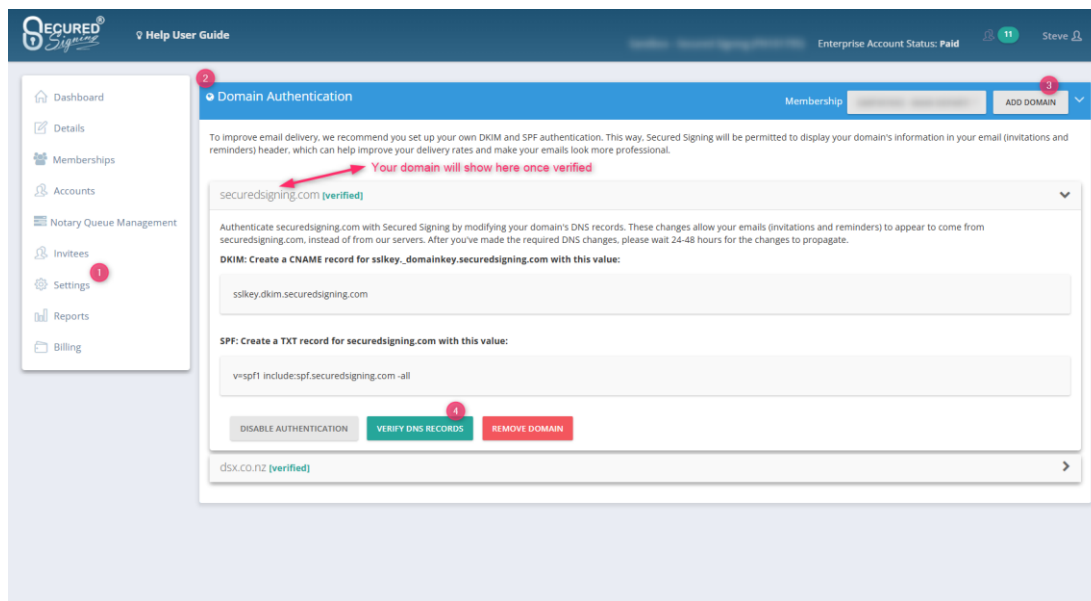
Also, we added decline stamp that include decline by who, why and date and time.



## Domain Authentication

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

Domain Authentication - select Add Domain



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

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

**DKIM: Create a CNAME record for `sslkey._domainkey.your_domain` with this value:**

`sslkey.dkim.securedsigning.com`

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

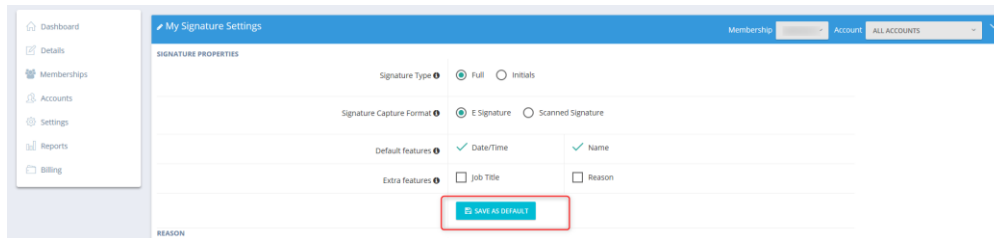
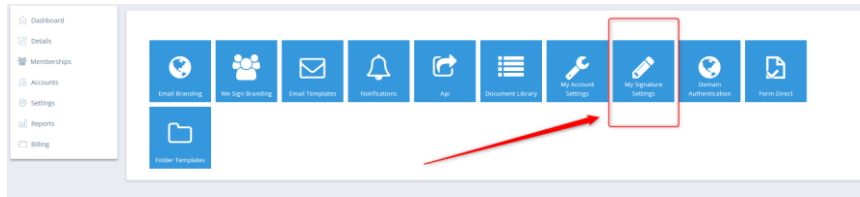
`v=spf1`

`include:spf.securedsigning.com -all`

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

## Signature Setting

Set up signature properties for all accounts in the enterprise

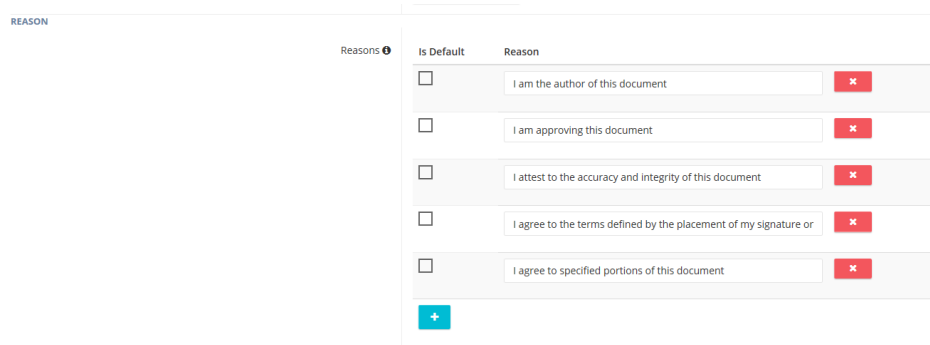


An account can now setup your signature properties from s within the We Sign process. If this is saved as a default, it will overwrite admin portal user setting.

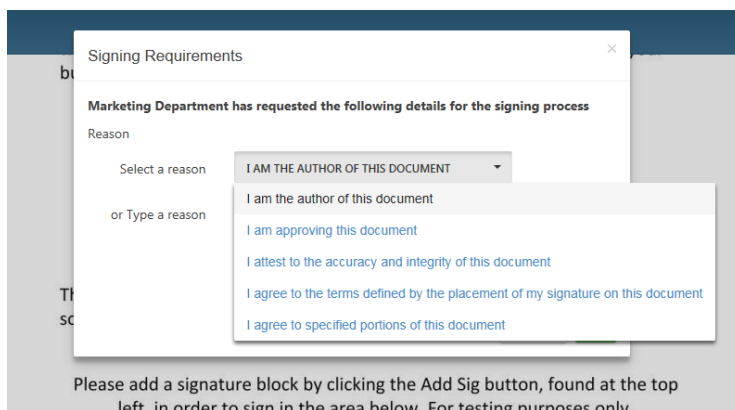
### Reason

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

Build your customised list of reasons using this setup screen.



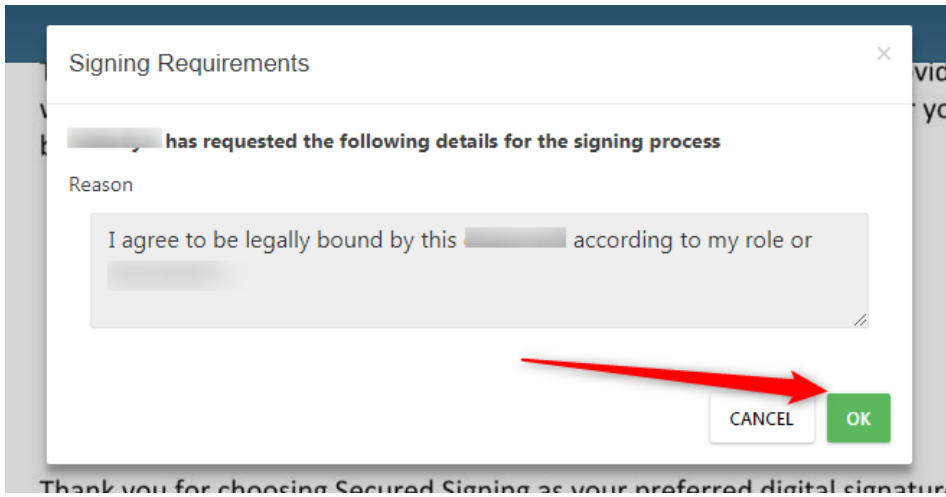
Invitee will see this during the signing process



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

Reason	Is Default	Reason
	<input checked="" type="checkbox"/>	I agree to be legally bound by this document according to my role or description
	<input type="checkbox"/>	

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



### Popup Type

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

Popup Type

Option A     Option B



### Signature Capture - Capturing method setup

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

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



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

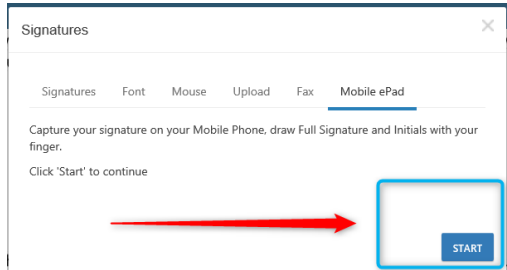
When capturing signature on mobile, the default is to draw on the glass, it will appear for invitee to draw signature with his finger. However, some account owners prefer different methods such as a predefined font, you can select this as shown in the image above.

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

### Mobile ePad

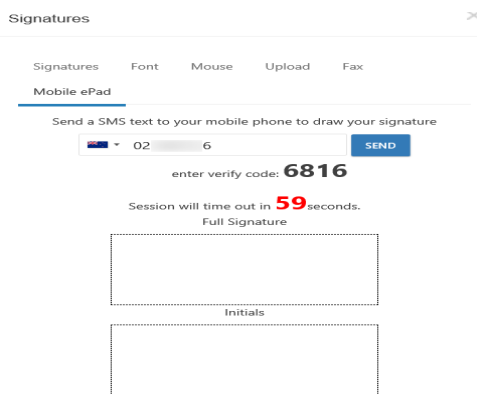
If you prefer to use a desktop but you want to draw your signature with your finger, same as a wet signature you can with our Mobile ePad capability. Use Mobile ePad to draw your signature on your mobile phone, and it will add these images to your Secured Signing process activated from a desktop.

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



#### With SMS

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



#### With a link

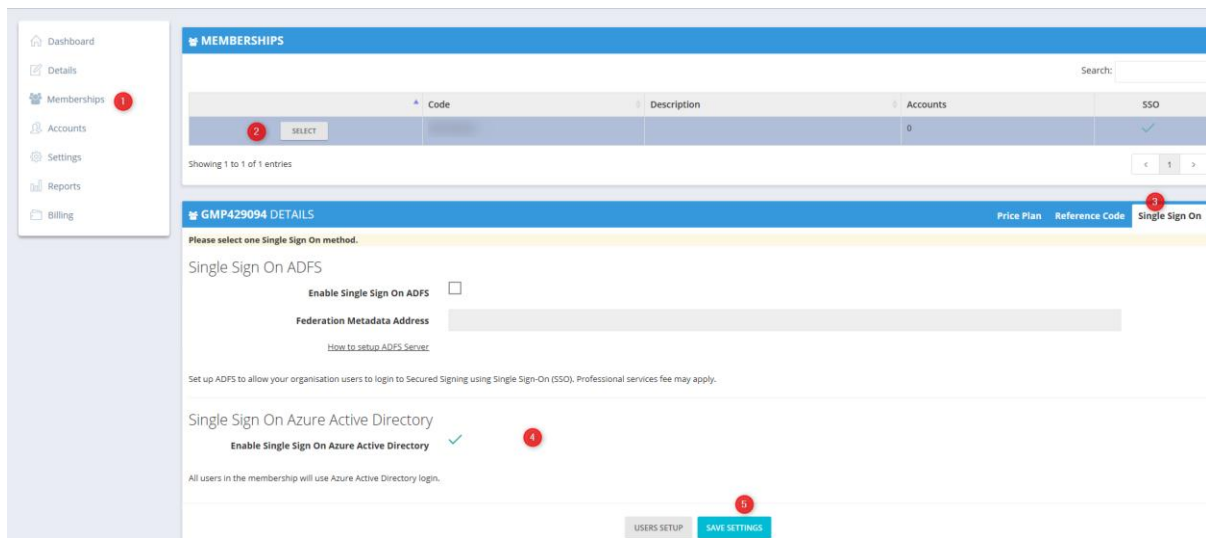
Entre the link in the mobile’s phone browser.



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

## Azure Active Directory Single Sign On – SSO

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



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

### Re-authenticate in AAD SSO

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

#### Single Sign On Azure Active Directory

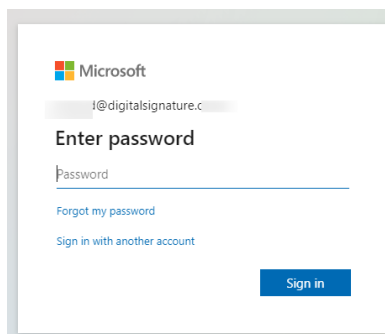
Enable Single Sign On Azure Active Directory ✓

Reauthenticate with AAD when user login ✓

Load Domains from your AAD for more settings

LOAD

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



### Load domains from Azure AD

Load Domains from your AAD for more settings LOAD

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

USERS SETUP SAVE SETTINGS

### Enable Invitees to use AAD SSO

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

Load Domains from your AAD for more settings LOAD

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

**AAD for Invitee**

EXCEPTIONS

### Add Exceptions to AAD for Invitee within a Domain

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

**AAD Authentication Disabled Invitees**

user1@digitalsignature.co.nz  
user2@digitalsignature.co.nz

one email per line

CLOSE SAVE

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

### Block Register Accounts

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

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

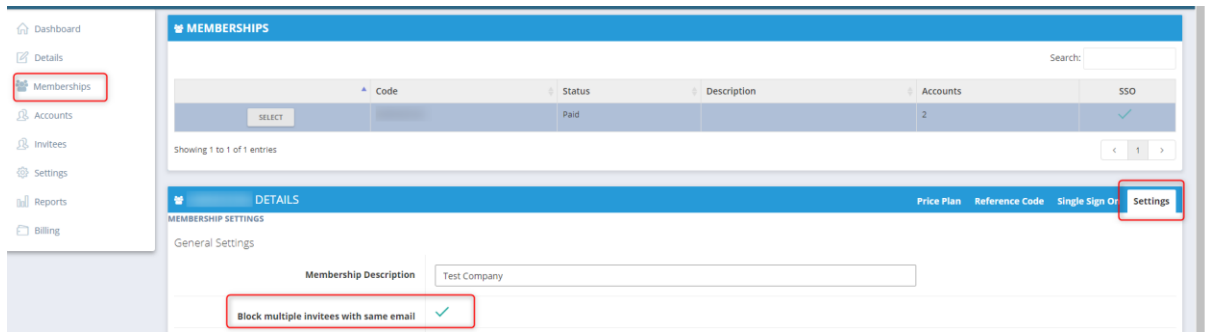
Load Domains from your AAD for more settings LOAD

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

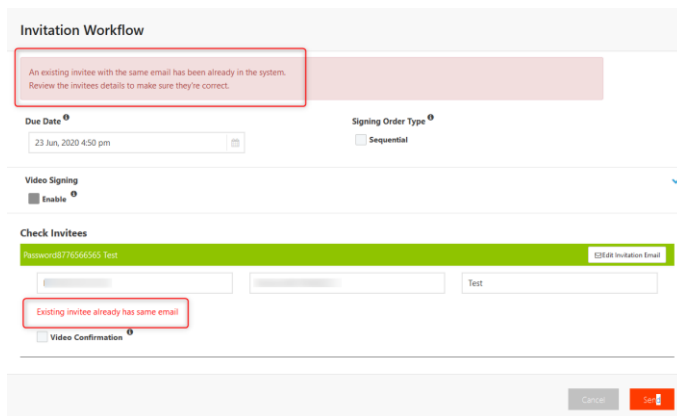
USERS SETUP SAVE SETTINGS

## Block multiple invitees with same email

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



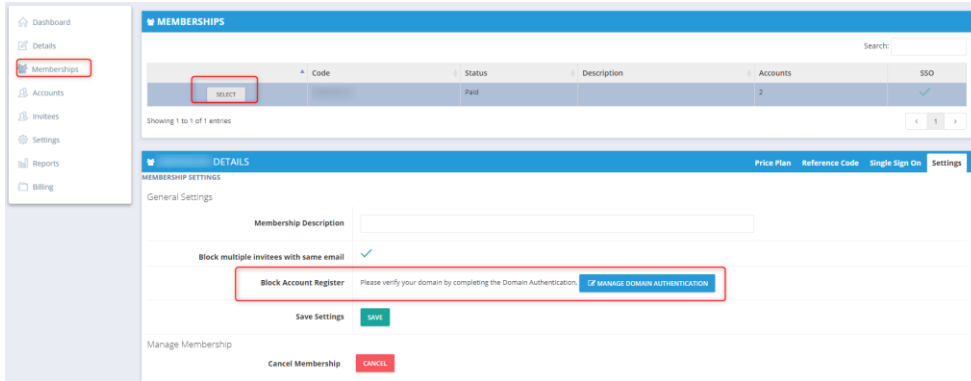
Admin users can set up the membership/enterprise account to stop this feature. So, if a user from the organisation/enterprise account invites an invitee of any type that has already been invited in the past, the name and email must to match the original invitee details. If not the user will get an error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



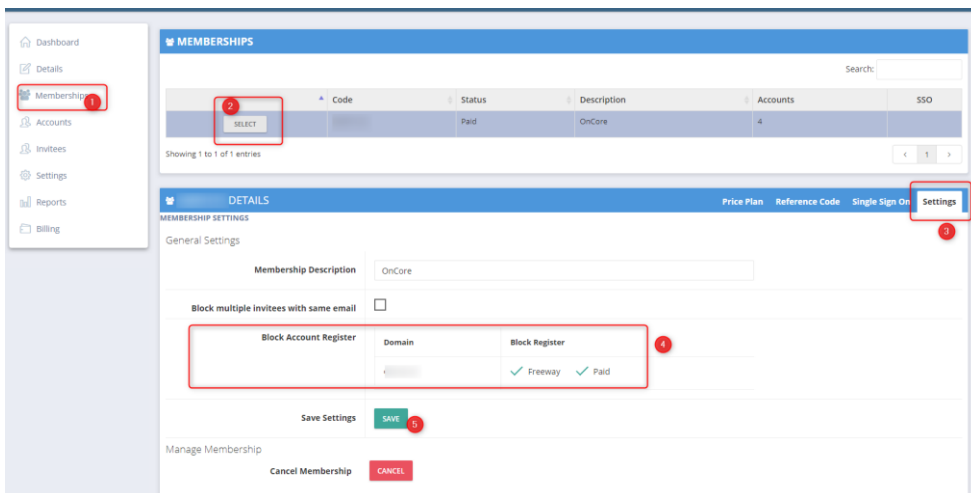
## Block Account Register

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

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



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



## Invitee Authentication Type – Password Policy

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

WE SIGN

Invitee Authentication Type
PASSWORD
Enforce Password Policy !
✓

Invitee Allows Decline

## Revoke Account - Users

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

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

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

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

Revoke account ×

To revoke the membership for the selected account, please enter your Secured Signing Password and select the following questions, then click Ok. (Revoke user will free up user licence)

Password

Has the user left the company?  Yes  No

Does this user need to sign documents as invitee only?  Yes  No

CANCEL
OK

## Suspend Accounts – Users

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

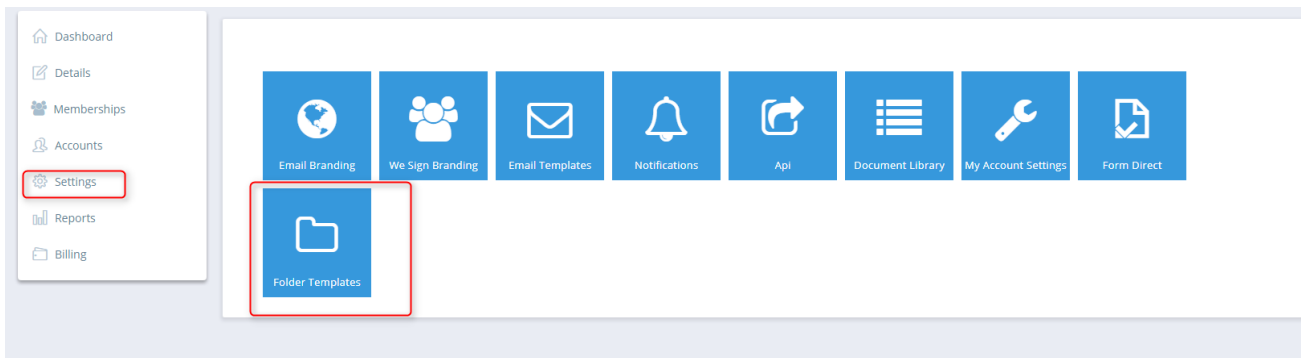
This process does not free up a user license.

The screenshot displays the 'Accounts' management interface. On the left, a navigation menu includes 'Dashboard', 'Details', 'Memberships', 'Accounts' (highlighted with a red box), 'Invitees', 'Settings', 'Reports', and 'Billing'. The main area shows a table of accounts with columns: Account NO., Reference, Company, Branch, Email, Name, Groups, Account Status, and Docs Used. Below the table, there are tabs for 'ACCOUNT DETAILS', 'Account Documents', and 'Integration - Connected Apps'. The 'ACCOUNT DETAILS' tab is active, showing fields for 'Company Name', 'Title', 'Street 1', 'Account Ref.', 'Email Address', 'Password' (with a 'RESET PASSWORD' button), and 'Account Status' (set to 'Paid Account'). At the bottom of the form, there are three buttons: 'SUSPEND ACCOUNT' (highlighted with a red arrow), 'REVOKE ACCOUNT', and 'UPDATE DETAILS'.

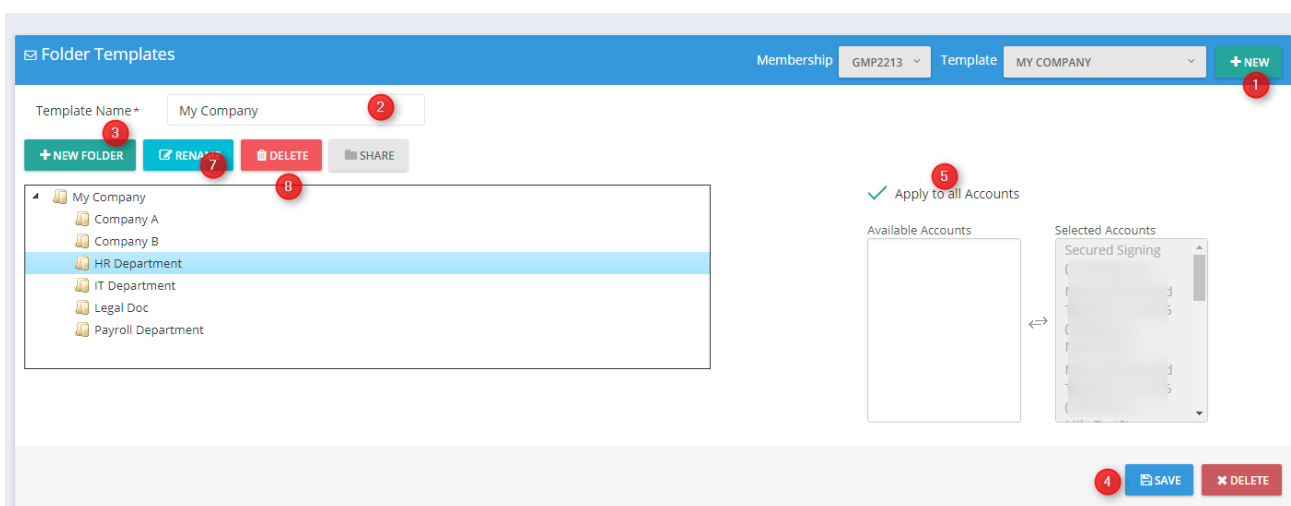
## Folder

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

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



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



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

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

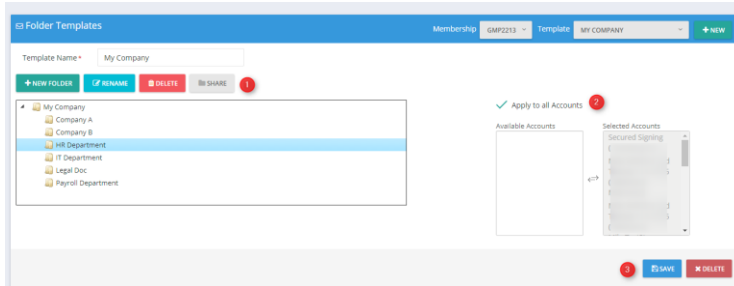
You can rename (7) folder name or delete folder (8) in case the folder is empty across all accounts.

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

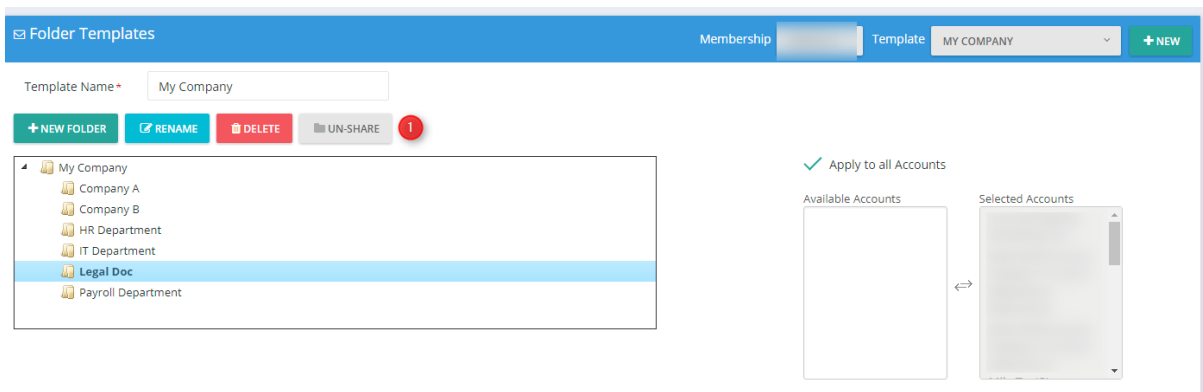
### Shared Folder

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

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



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



How shared folder works?

Admin User can share folder with all accounts/ user in the enterprise account or with selected accounts/ user

Then in the account level

Any document that is uploaded by any user to shared folder it will visible to all Account’s users.

A user who sent the document for signature becomes the document owner.

The document will be moved to in progress tab after it has been sent for signature and will be visible for all account’s user.

In Progress Tab there are few actions icons, any user will be able to complete one of these actions. However, delete function will be available for document owner only, but other user will be able to help in supervisor and manage the signing process.

#### Actions

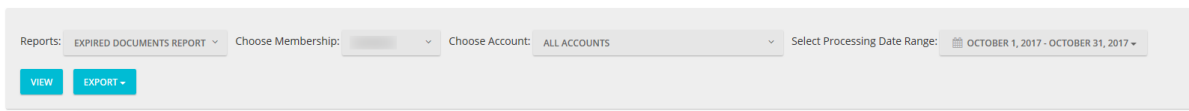


Once a user removed from a folder template and it is not share with him, all documents belong to the users will move to document owner Inbox.

## Reports

### Expired Documents report

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

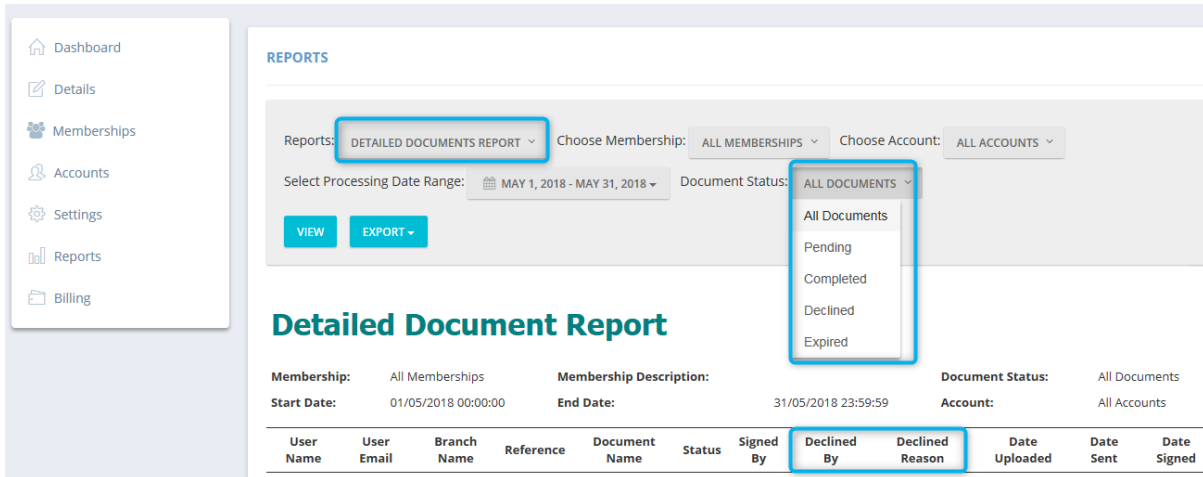


### Expired Documents Report

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

### Detailed Document report

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

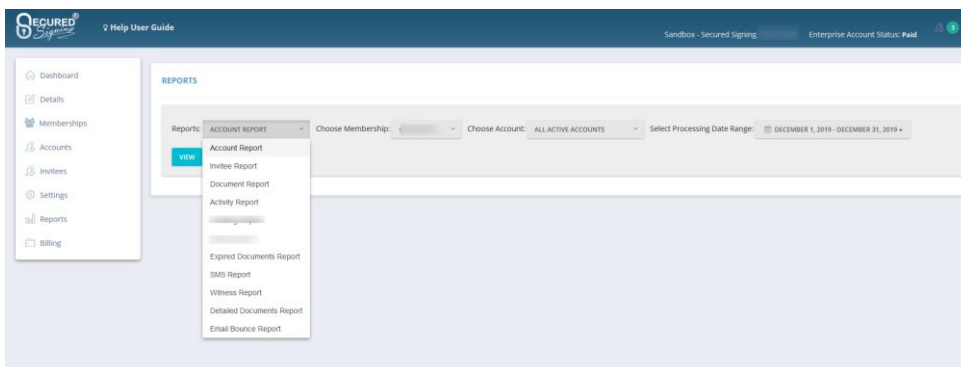


### Revoked Users report

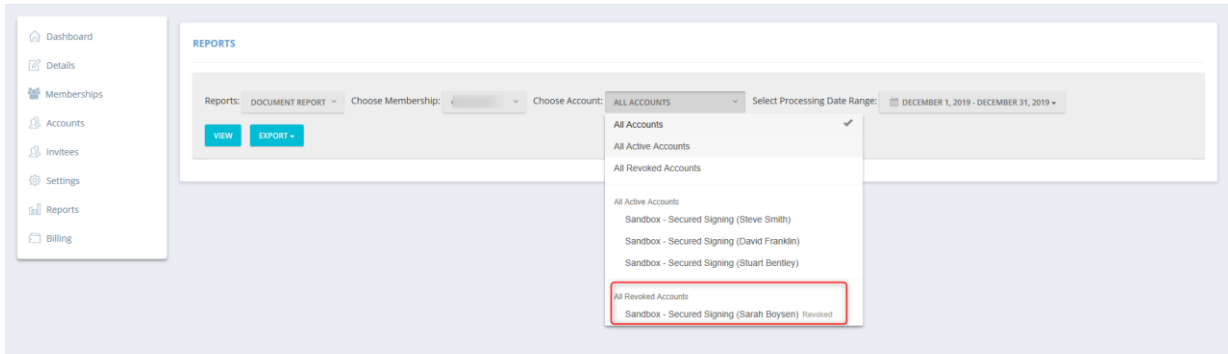
Once a user has left your company you may need to revoke this user to prevent them logging in to Secured Signing.

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

The following reports are available for revoked users:



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



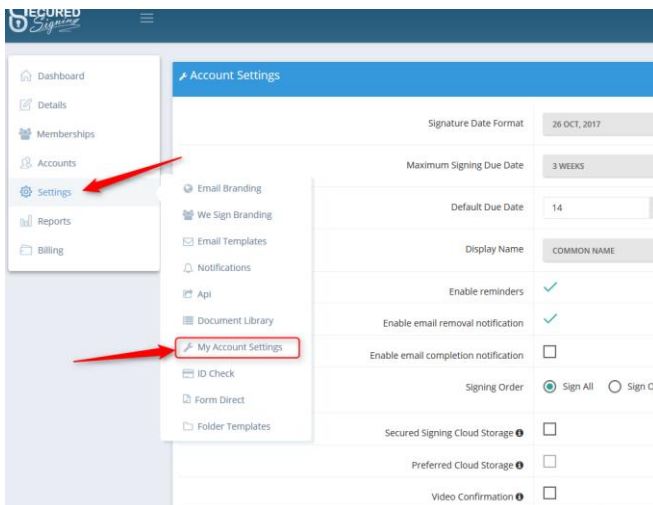
## Reroute

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

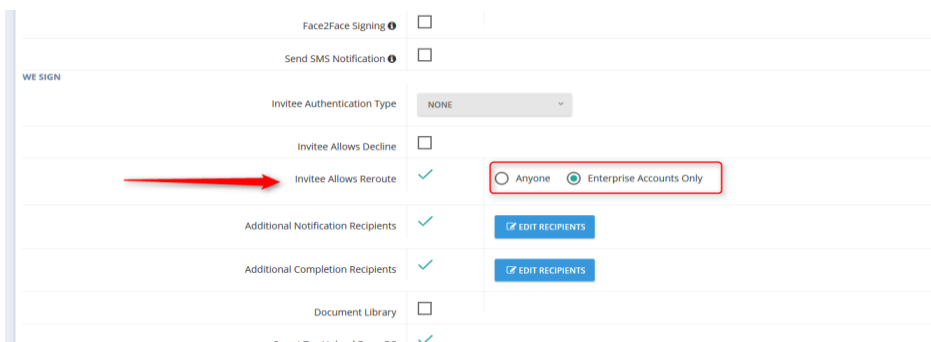
### Reroute Type Settings

Setup RerouteType => “Enterprise Accounts”

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



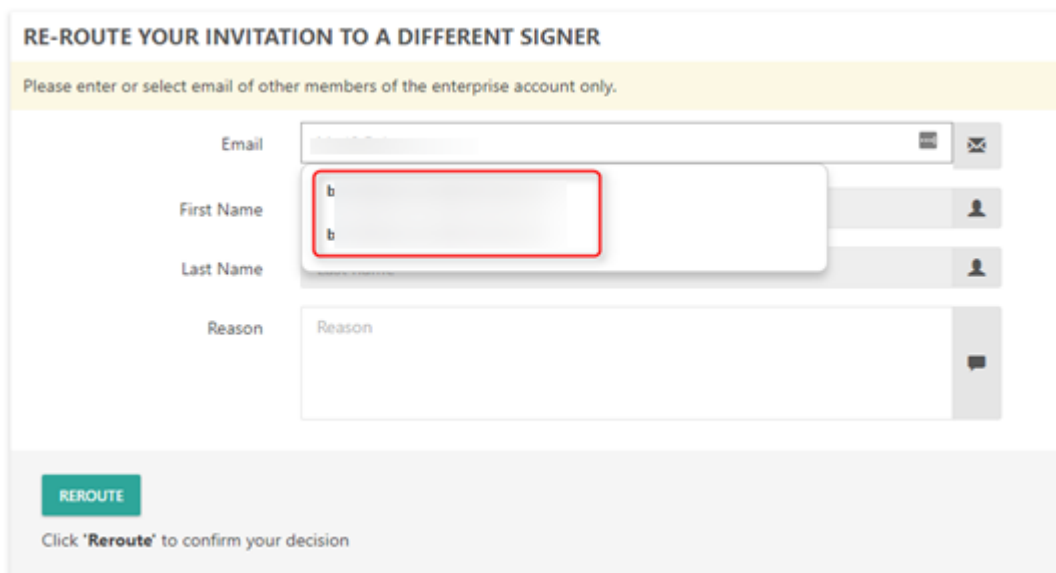
2). Go down and find “**Invitee Allows Reroute**”, make sure it has been ticked first, after that, extra option shows: 1- **Anyone** (default), 2 – **Enterprise Accounts Only**.



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

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

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



**RE-ROUTE YOUR INVITATION TO A DIFFERENT SIGNER**

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

Email

First Name

Last Name

Reason

**REROUTE**

Click 'Reroute' to confirm your decision

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

## Admin User Permission

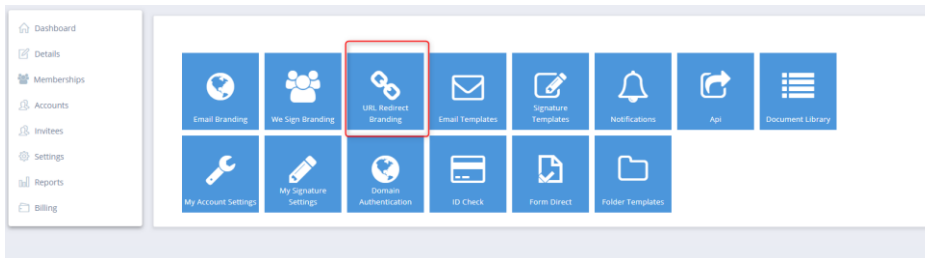
Admin user can select different permission levels for other users in the Enterprise portal.

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

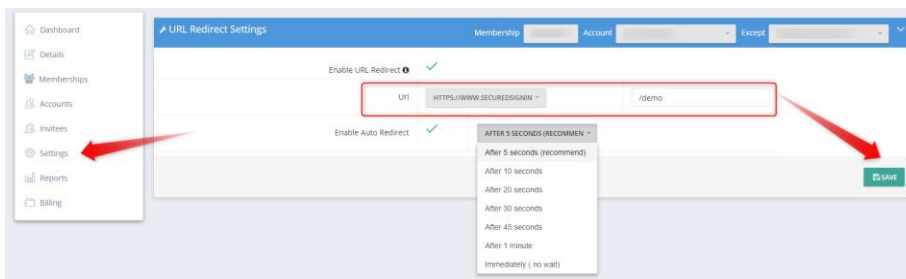
View only permission allows this user to view account information and documents with very limited functionality at the account’s setup level

## URL Redirect Branding

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



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



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

Once done click save.