ARCSign

eSignature Software

Archarina

ArcSign

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Working with Templates

Tracking Your Sent Documents

Archarina

ArcSign is a digital signature app that lets you easily email PDF documents for digital signatures. You can enter multiple groups of email addresses and customize the document with fields such as signature, date, and initials.

After you purchase ArcSign, you will receive your username and password to log in at https://arcsign.archarena.com/.

ArcSign Home

The Home screen in ArcSign shows you an overview of the PDFs you set up or sent to be signed. You can see your total documents broken into the following categories: Not Sent, Sent, Signed, Declined, and Archived.

At the bottom of the Home screen, a table shows all the documents you uploaded and their statuses. Use the filter fields at the top of the table to see only the documents you want.

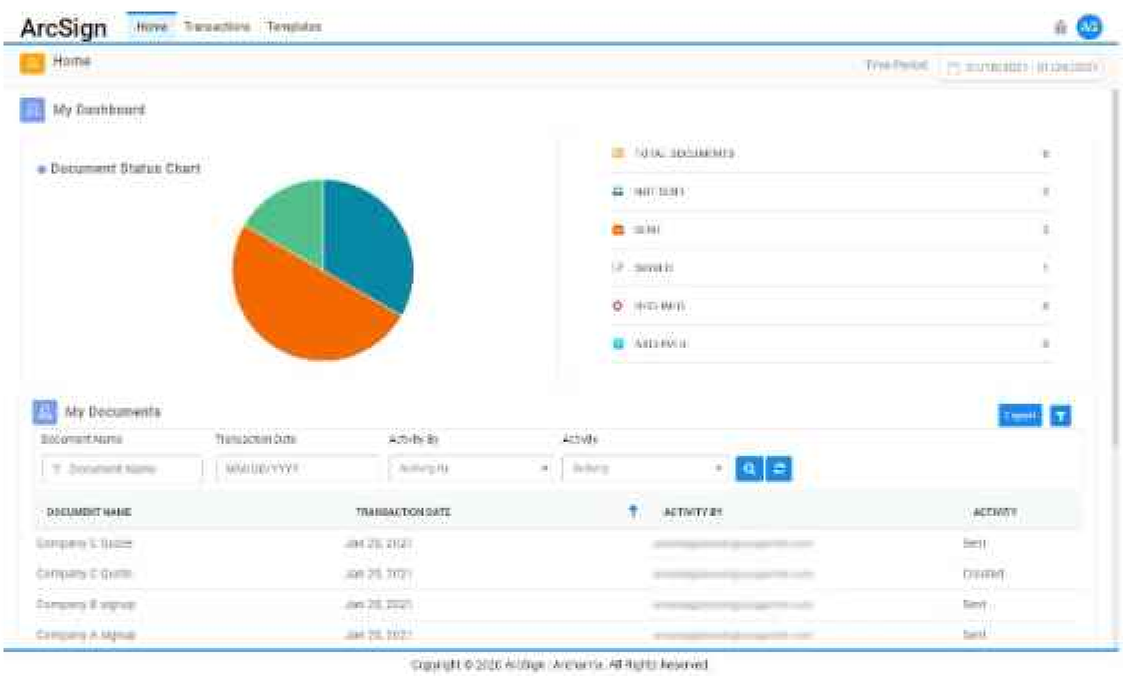

Figure 1: *ArcSign Home screen*

You can export the information in the **My Documents** table to a CSV file by clicking the **Export** button at the top-right above the table. The export will only show what is in view in the table (i.e. if you filtered the table to only show certain information, only that information will be in the export file).

Setting Up Your PDFs for Signatures

When you want to set up PDFs to send for signatures or see the details of PDFs you already sent, open the **Transactions** screen.

Uploading a New PDF

Unless you are sending a PDF from a template, you'll need to upload the PDF you want to send for a signature. These steps will guide you through uploading your document, adding the signature and other fields, and emailing the document.

To upload a PDF

1. Click **Transactions** on the menu bar.
2. From the **New Transaction** drop-down in the top-right corner, click **Add New Document**. The **Add Document** window will open.

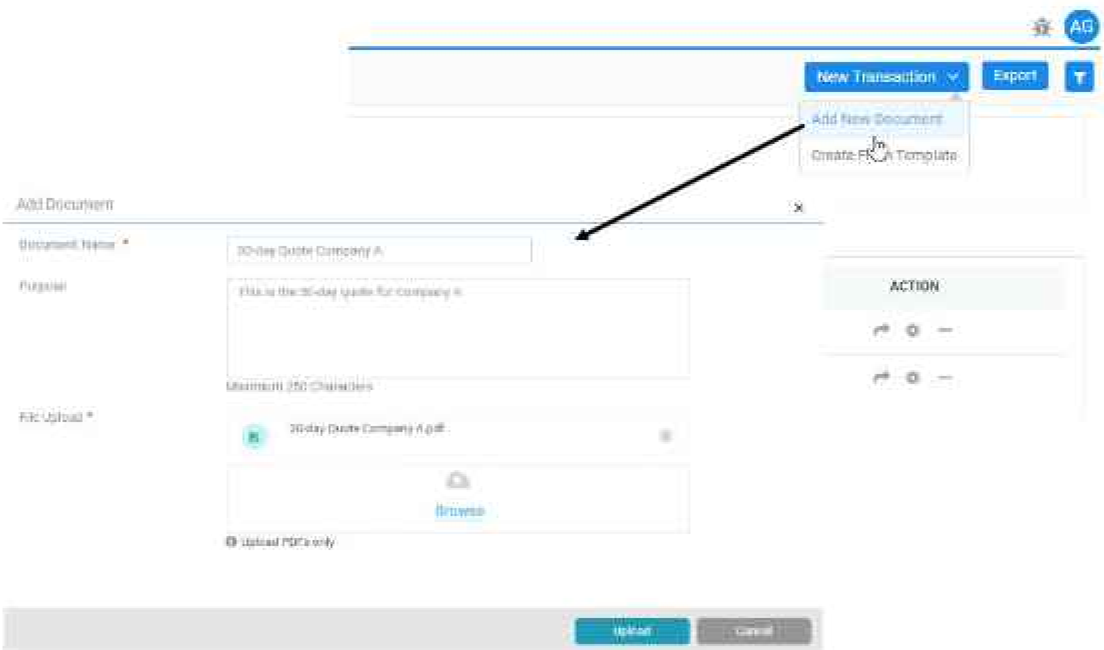

Figure 2: *Add Document window*

3. Enter the name of your PDF and why you're sending it.
   For example, the title could be *30- day Quote Company A* and the purpose could be *This is the 30-day quote for Company A*. The name of the PDF will be sent to the recipient and the purpose will show in the **Transactions** screen table.
4. Click **Browse** to navigate to the PDF you want to send.
5. After you find the PDF, click **Open**. The name of the PDF will appear above the Browse box. If this is not the correct PDF, you can delete it by clicking the Trash icon next to the name and then find the correct PDF.
6. After you enter the name and purpose and have the correct PDF, click **Upload**.

To add signers and viewers to your PDF

After you upload your PDF, the **Who is Signing (Add or Edit)** window will open. You can set up different groups of signers with multiple people in each group. The PDF will not be sent to the second group until the first group has signed it, and so on.

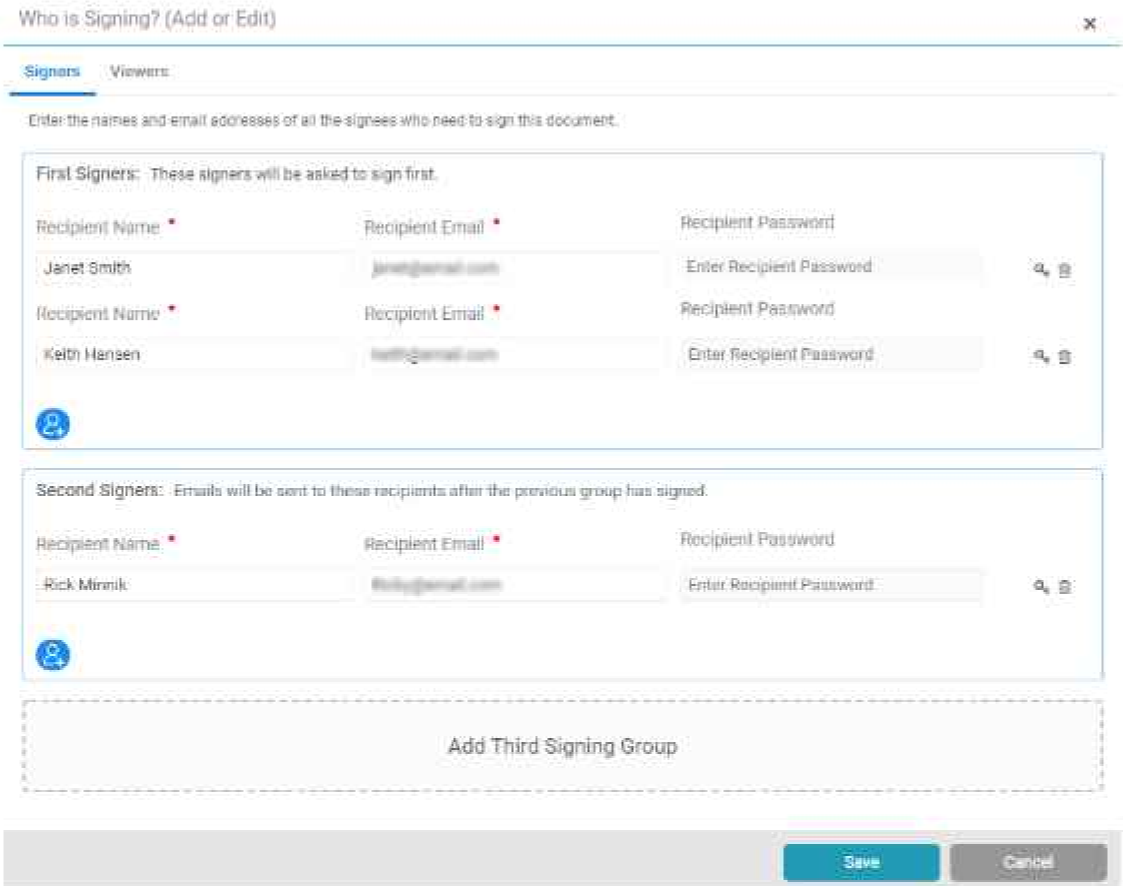

Figure 3: *Who is Signing (Add or Edit) window*

1 In the First Signers group, enter the name and email address of each person who needs to sign the document first. To add additional recipients, click the Add Signer icon in the lower-left of the First Signer group box.

2 If you want the PDF to be password protected, click the key icon at the end of the row. This will enable the **Recipient Password** field where you can enter any password you want. You will need to share this password with the recipient separately.

3 If there is another group that needs to sign the PDF after the first group is finished, click the **Add Second Signing Group** box and add the names and email addresses for the recipients in this group. You can add as many groups as you need. Subsequent groups will not receive the PDF to sign until the group before them has submitted their signature or response.

4 If there is anyone who needs to see the signed document who isn't part of the signing group, you can add them to the **Viewers** tab in this window. Viewers you add on this tab will receive a copy of the final signed document.

5 When you're finished adding all the signers and viewers for this document, click the **Save** button. This will save the recipients and open the PDF so you can set up where your signature boxes should go.

To set up the signature fields on your PDF

After you add all your signers and click **Save**, the **Signature Setup** window will open. With your document in view, you will see your setup options in the panel on the right.

If you need to add more recipients or edit the name or email address of existing recipients, click the **Add / Edit** button in the **Recipients** section of the panel. This will bring you back to the Who Is Signing window where you can make any needed changes.

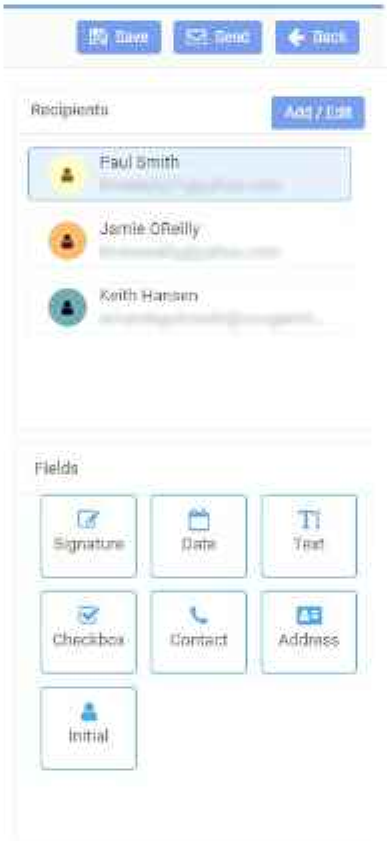

Figure 4: *Signature Setup panel*

1. In the **Recipients** section of the panel, highlight the recipient you want to set up signature fields for.
2. To add a field to you document, click the field in the **Fields** section of the panel and drag it to the location in the document where you want it.
   After it's added to the document, you can resize any field by dragging it's outer edges. You can also move fields by clicking on the center of the field and dragging it.
3. Repeat this for all the fields you want to add for the highlighted recipient.
4. Highlight the next recipient you want to add fields for, and follow the same steps to add all the signature fields necessary for them. Repeat until all the fields are added for all your recipients.
5. When you are done adding fields, you can choose to **Save** the document (to send at another time) or **Send** the document now by clicking the appropriate button at the top of the panel.

   You can find all your documents and their statuses on the **Transactions** screen. For information about the action options available, see "Actions Available on the Transactions Screen" on page 8.

Actions Available on the Transactions Screen

On the Transactions screen, you can see a list of all the documents you set up or sent for signatures. They are sorted by Not Sent, Sent, Signed, Declined, and Archived. Click on each tab to see the documents in that category.

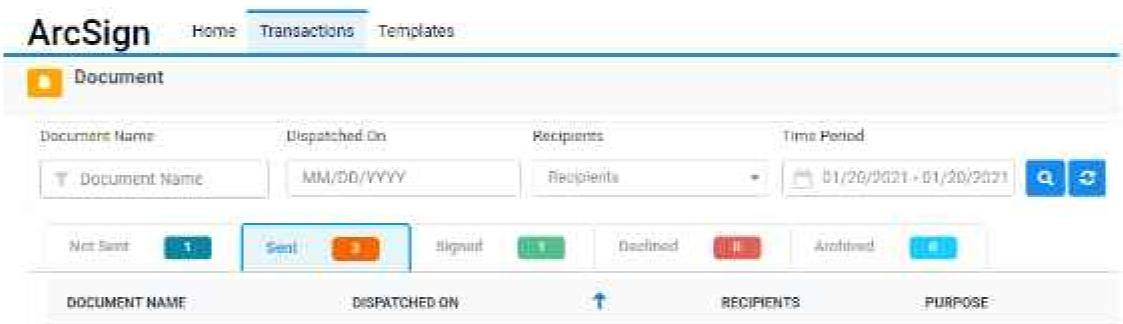

Figure 5: *Transaction screen category tabs*

You can filter the documents by name, recipient email address, date range, and depending on the category you're in, by sent date, signed date, declined date, or archived date. To use a filter, enter the filter criteria and click the Search icon at the end of the row.

> ***NOTE:*** *The default date range is the current week. You will not see any documents outside this date range unless you change it in the Time Period field.*

You can find important information or complete tasks from the table rows. You can change the sort order of each column by clicking on the heading row.

- **Document Name** and **Purpose**: this is the name and purpose you entered when you set up the PDF.
- **<Action> Date**: the date in this column is based on the date the action was taken (i.e. Sent, Signed, etc.)
- **Recipients**: If you hover over this column you can see the email addresses the document was sent to. In all categories except Not Sent, you can click **View Details** to see the status of the document for each email address. For example, who has signed, declined, or not responded yet. See "Tracking Your Sent Documents" on page 13 for more information.
- **Action**: the options in this column depend on which category you are in. You can set up, send, preview, edit, delete, download and archive documents. Hover over the icon to see which action is available.

You can export a CSV file of the documents that appear on screen by clicking the **Export** button in the top-right corner. The export will only show what is in view (i.e. if you filtered the table to only show certain PDFS, only those will be in the export file).

For more information about the status of sent PDFs, see "Tracking Your Sent Documents" on page 13.

Working with Templates

If you have a document that you always send out, for example a New Customer Agreement, you can set it up as a template. This way you don't need to upload it each time and you will just need to enter the email addresses of who you're sending it to. You will have the option to make changes to the signature fields before you send it.

Uploading Templates

The first thing you need to do to take advantage of templates is to upload the documents you use frequently.

1 Click **Templates** on the menu bar.

2 In the top-right corner of the window, click the plus (+) icon. This will open the **Create New Template** window.

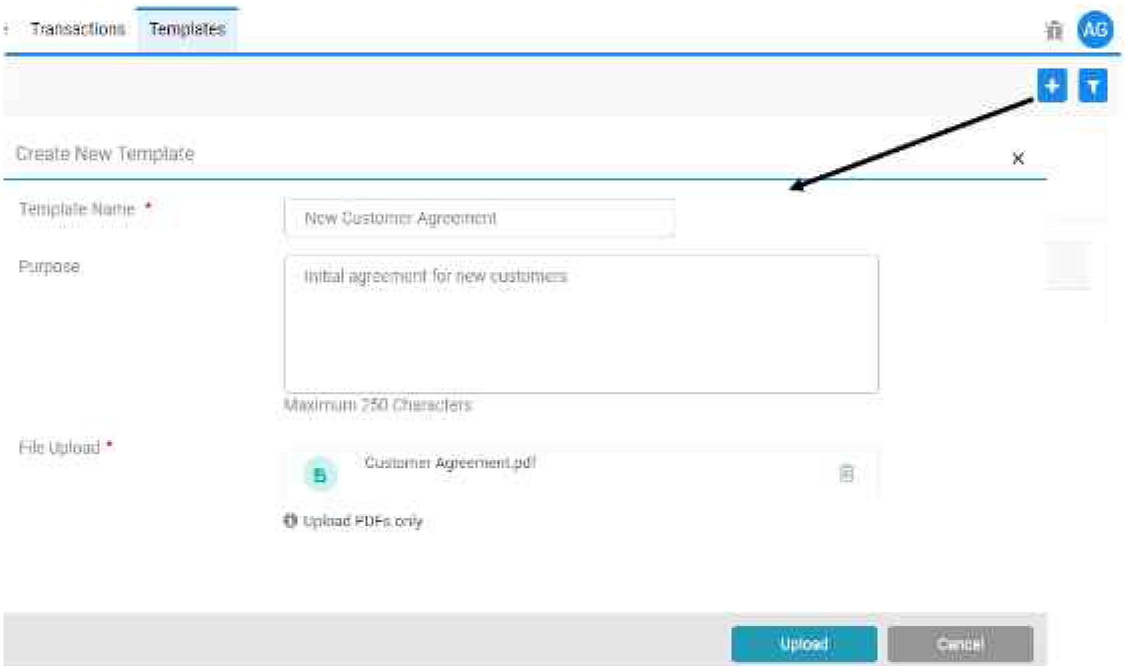

Figure 6: *Create New Template window*

3 Enter the name of the PDF template so it can be easily identified, for example, *New Customer Agreement*.

4 Enter the purpose of the document, for example, *Initial agreement for new customers*.
The information in the **Template Name** and **Purpose** fields will appear in the Template grid so you can find the template you are looking for when you want to send it out for signatures.

5 Click **Browse** to navigate to the PDF you want to send.

6 After you find the PDF, click **Open**. The name of the PDF will appear in the New Template window. If this is not the correct PDF, you can delete it by clicking the Trash icon next to the name.

7 Click **Upload**.

Setting Up the PDF for Recipients

1 After you upload the PDF, the **Who Is Signing (Add or Edit)** window will open.

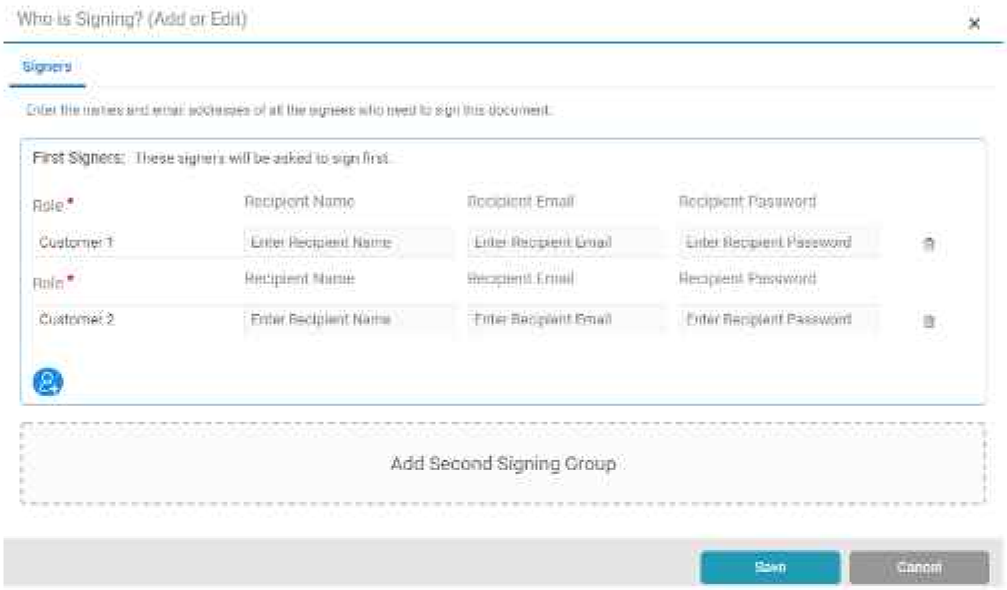

Figure 7: *Template Who is Signing (Add or Edit) window*

2 Because this is a template, you won't be adding names and email addresses, but you need to add which people need to sign it. In the **Role** fields, enter the roles of the people whose signature you need. Some examples are *Owner*, *Customer*, *HR*, or *Builder*.

3 After you enter the necessary roles, click **Save**. The **Signature Setup** window will open.

4 From the Signature Setup panel on the right side of the window, highlight the recipient role you are adding signature fields for.

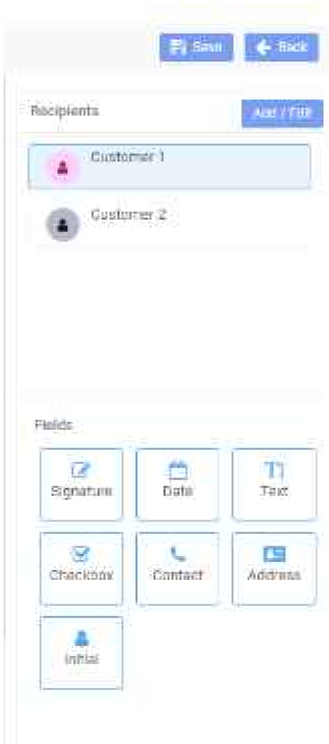

Figure 8: *Signature Setup panel*

5 In the **Fields** section of the panel, click the signature field you want to add and drag it to the area of the document where you want it. You can resize and move the fields around after you add them to the PDF.

You only need to add the signature fields that you will always need on the document. You will be able to add and edit these fields for each recipient. For example, maybe every time you send this document you will need a signature and date, but only certain times you would need initials. In this case, you would add the signature and date fields where you want them, but add the initial fields when you're setting up the document to send to a specific recipient.

6 Repeat this for all the roles and template fields you want to add to this document.

7 When you are finished, click **Save** above Setup Signature the panel.

Sending a PDF From a Template

When you want to send a document from a template you previously set up, there are two ways you can access the template. The first way is from the **Templates** tab. Find the template you want to send (you might need to change the **Time Period** filter to see the template you're looking for) and from the **Actions** column, click the Use Template icon (it looks like a gear).

Figure 9: *Set up a template icon*

The second way to access a template is from the **Transactions** screen. In the right-hand corner of the window, click **New Transaction** > **Create From Template**. In the **Create From Template** window, select the check box next the template you want to use and click **Create**.

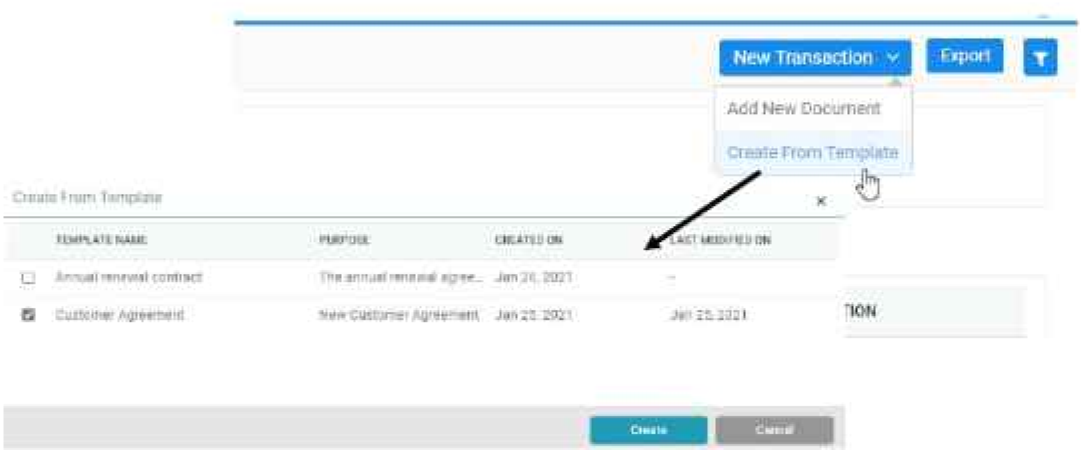

Figure 10: *Create From Template window*

Both of these options will open the **Add Transaction** window.

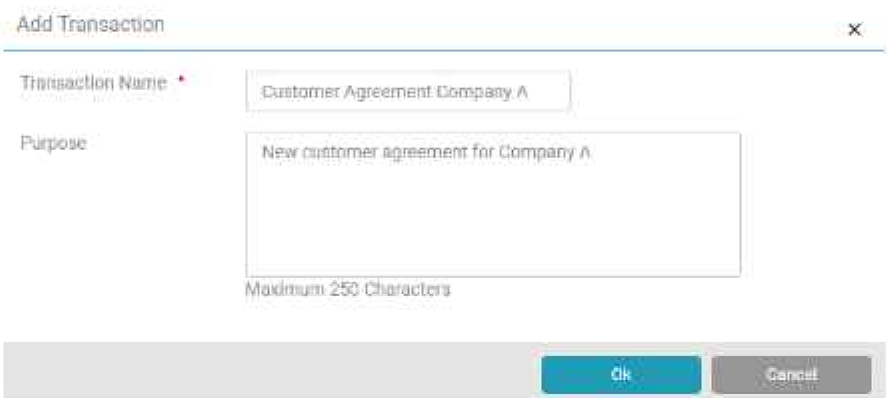

Figure 11: *Add Transaction window*

1 In the **Transaction Name** and **Purpose** fields, enter the name of this document and the reason for it. For example, *Customer Agreement Company A* and *New customer agreement for Company A*.

2 Click **OK**. The **Who Is Signing (Add or Edit)** window will open.

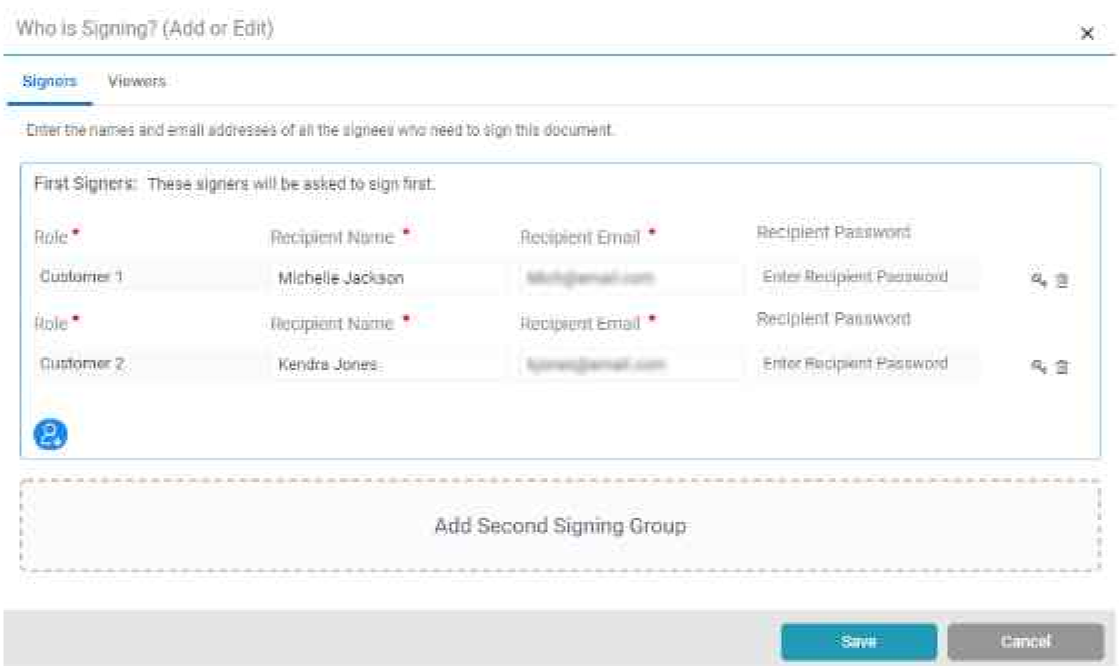

Figure 12: *Who is Signing (Add or Edit) window*

3 The roles you defined in the template will be in view. Enter the name and email address for each recipient.

To add more recipient rows, click the Add Signer icon on the lower-left. To delete a recipient, click the Trash icon at the end of the row. If you want to set up a password for any of the recipients, click the Key icon at the end of the row and enter the password in the **Recipient Password** field (you will need to share the password with the recipient separately).

Recipients in subsequent signing groups will not receive the PDF until everyone in the previous group has signed.

4 If there is anyone who needs to see the signed document who isn't part of the signing group, you can add them to the **Viewers** tab in this window. Viewers you add on this tab will receive a copy of the final signed document.

5 After all your recipients are set up, click **Save**. The **Signature Setup** window will open.

6 The fields you added to the template will already be on the PDF. Make sure all the fields you need for this recipient are in the document and in the correct place.

If you need to add more fields, click the field you need to add from the panel on the right and drag it to the document location where you want it. Remember you can resize and move fields as necessary.

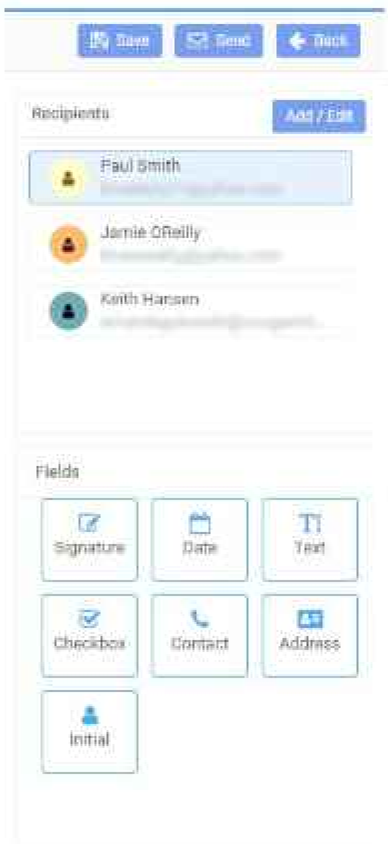

Figure 13: *Signature Setup panel*

7 After all the fields are in place, **Save** the document (to send at another time) or **Send** the document now by clicking the appropriate button at the top of the panel.

For information about the status of your sent PDFs, see "Tracking Your Sent Documents" on page 13

You can find all your documents and their statuses on the **Transactions** screen. For information about the action options available, see "Actions Available on the Transactions Screen" on page 8

Tracking Your Sent Documents

As your document is sent to different people to be signed, you can see where it is in the process. To do this, open the **Transactions** screen and hover over the number in the **Recipients** column (on any tab except **Not Sent**). Then click **View Details**. This will show you the document status for each email you address you added.

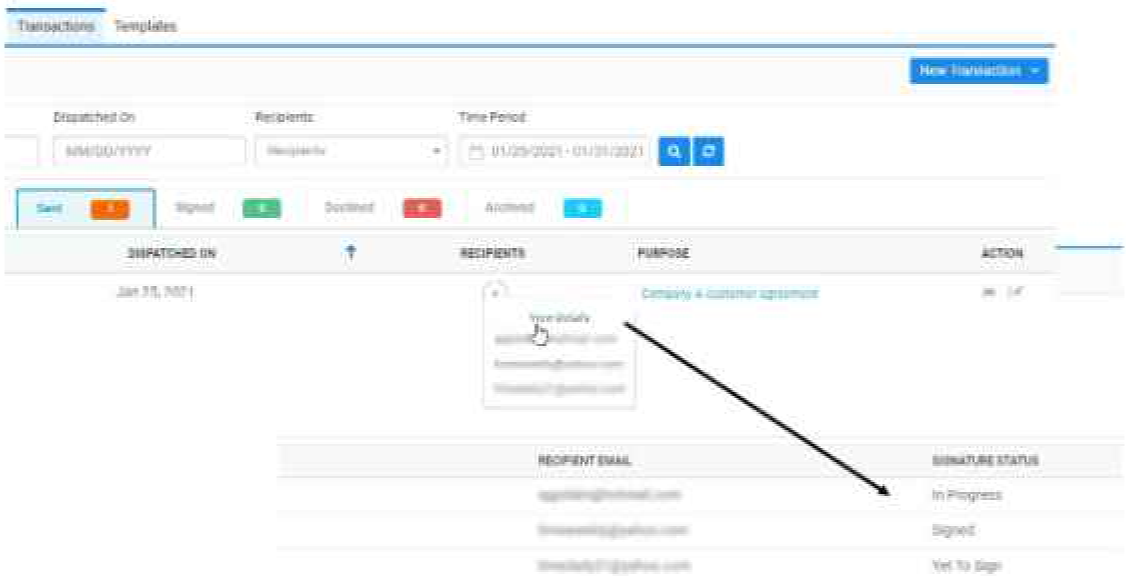

Figure 14: *View Document Details*

Your documents will follow this path.

1 The PDF is sent to the recipients in the First Signature group.

2 After everyone in the First Signature group responds, the PDF is sent to the Second Signature group. Each subsequent group receives the PDF only after everyone in the group before them has signed/ responded.
After signing and submitting the PDF back to you, each recipient will receive a copy of the PDF with their signature.

3 After everyone has signed/responded, the PDF is sent to anyone you added as Viewers.

At any time you can resend the PDF, edit recipient names and email addresses, and change the signature fields. Access these options from the **Actions** column on the **Transactions** screen.

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