INSTRUCTION MANUAL

Version 1.4.3

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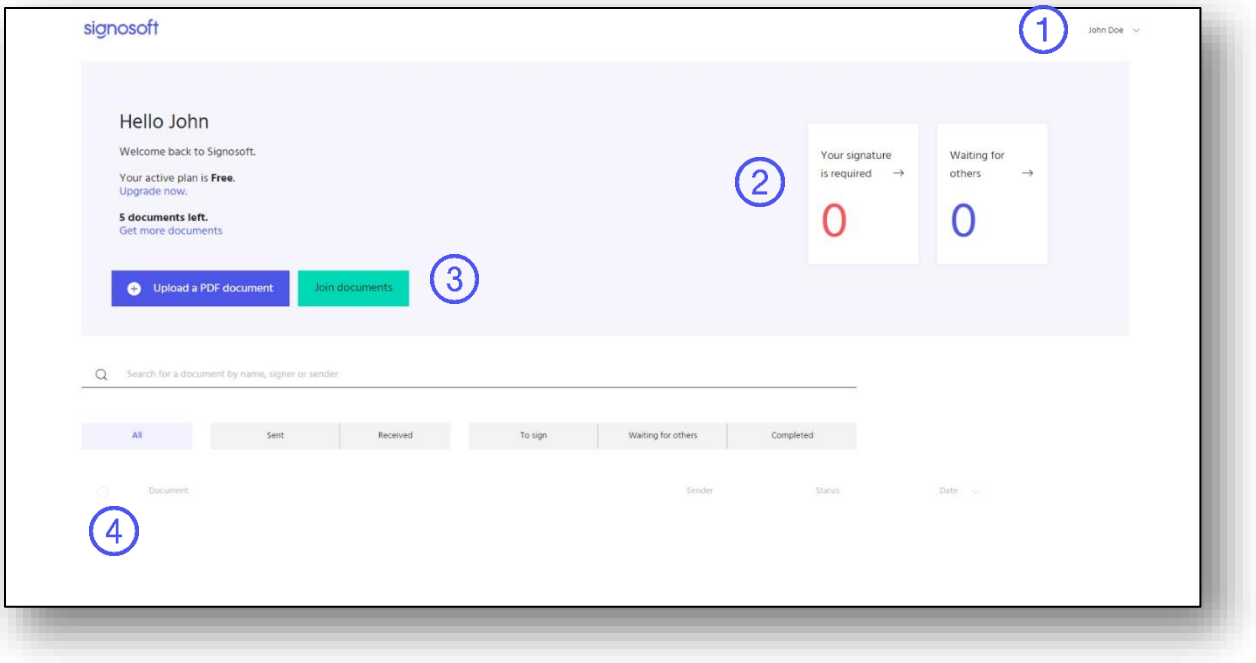
The Dashboard Screen

Your Account is managed by clicking on your name at the top-right corner of the dashboard. Below this is the Status area followed the Upload PDF document button and Join documents button. Below the horizontal line is the Documents area.

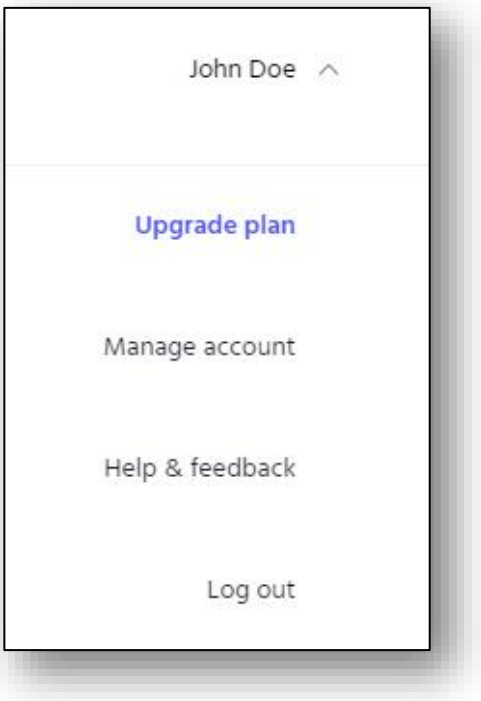


1. Dashboard **Account** Links
2. Dashboard **Status** Area
3. **Upload PDF document** Button and **Join Documents** Button
4. Dashboard **Documents** Area

The Dashboard Screen Account Links

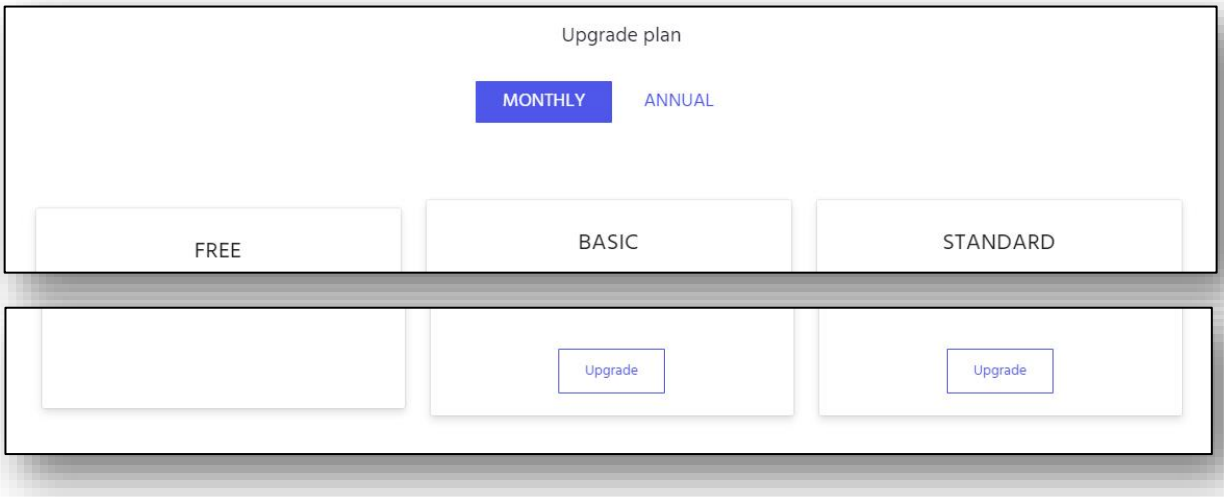
Your name will appear in the upper right-hand corner of the Dashboard. Click it and you will see links to edit your account:

- Upgrade plan
- Manage account
- Help & feedback
- Log out



Upgrade Plan

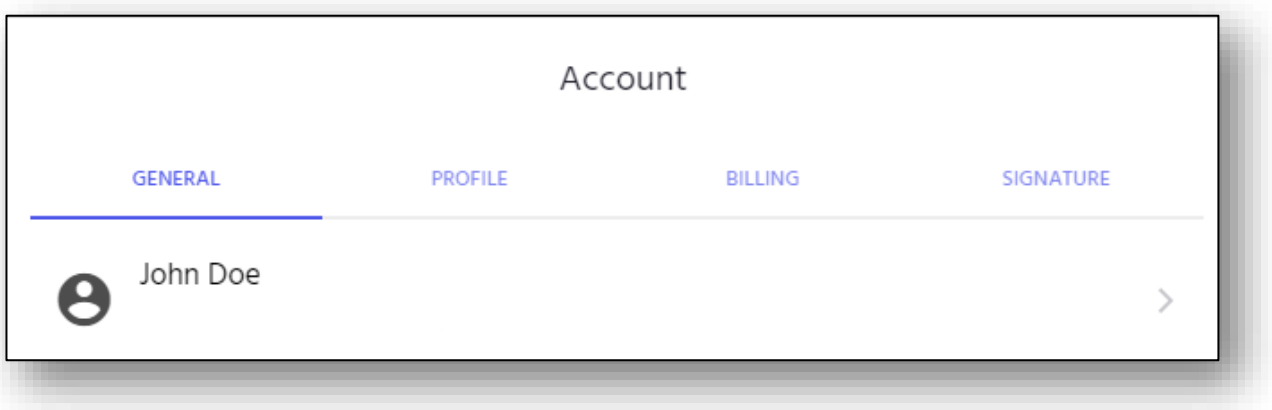
This section allows you to compare the current plans we are offering, with the ability to change your plan to meet your needs.



At the top of the page, you can choose if you want to see pricing by monthly or by annual billing. If your current plan doesn't meet your growing needs, you can upgrade it to get a higher allowance of documents.

Manage Account

There are four tabs in this section:



General
On this page, you can review your current plan, buy more document credits, or upgrade your plan.

Profile
Change your name, billing address, password, and other contact information, here.

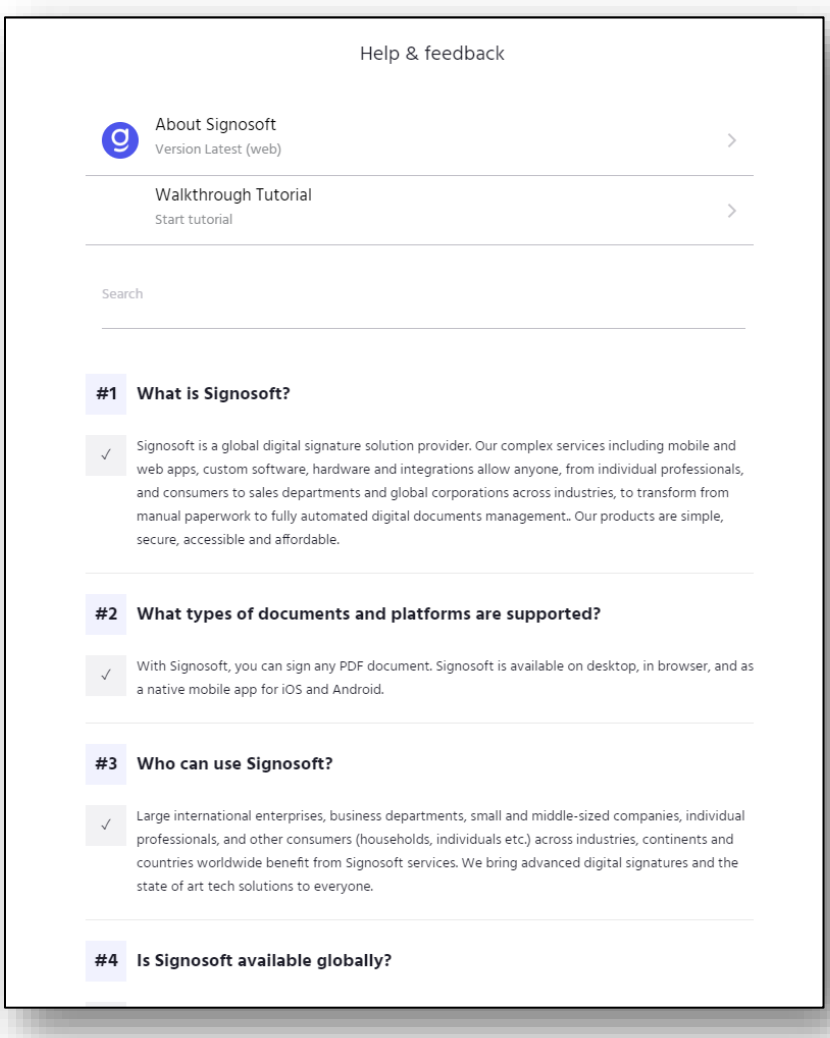
Billing
Besides upgrading your plan, or buying more document credits, you can review your payment method and history.

Signature
You can design how your signatures are going to look and feel here.

Help & Feedback

Our help page is for those who need specific answers to technical questions. There are two links at the top.

The first one, About Signosoft, will display the version, support contacts, and which code repositories were used to create Signosoft. The second link, Walkthrough Tutorial, displays a tutorial slideshow of the Signosoft workflow.

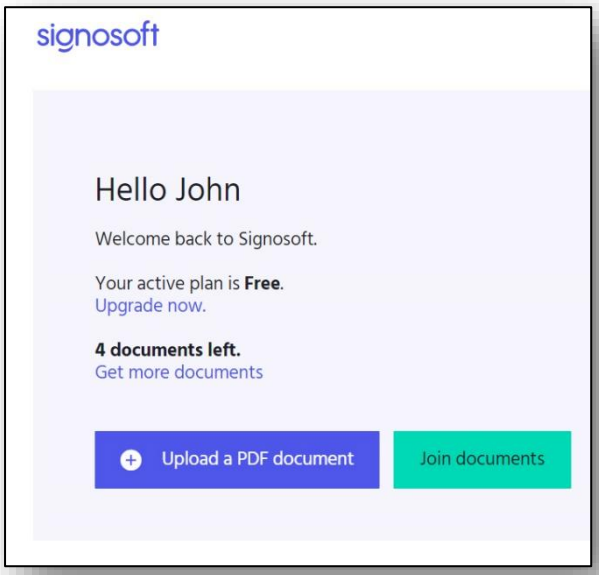


Below this are Frequently Asked Questions (FAQs), with a search function to help you find the correct answer.

Log out

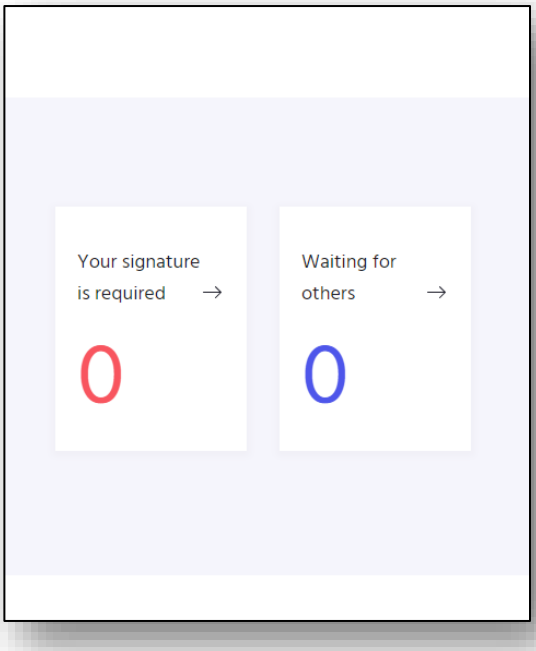
Logs your account out of the Signosoft system.

The Dashboard Status Area



On the left side is information about your current plan, a link to upgrade, the Upload PDF document button and the Join documents button.

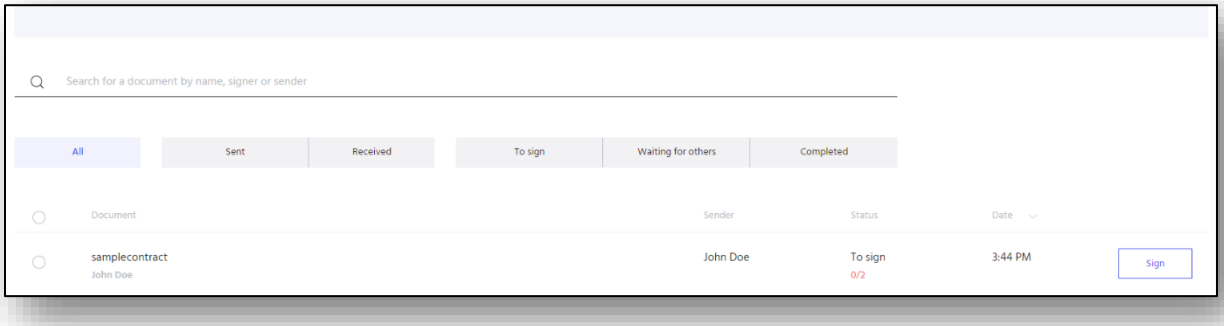
See the Signosoft Workflow below for more information about these buttons.



The right side displays the number of documents waiting for your signature and the number of documents waiting for a different signer.

Click either of the displays and those documents will be listed in the Documents area.

The Dashboard Documents Area



Below the Status area is a list of all your documents. If you are having difficulty finding a file, you can use the Search bar to find it by filename, signer(s), or owner.

The buttons below the search are filters for the list:

• **All:** Show all of your documents.

• **Sent:** Displays only the documents sent out for signing.

• **Received:** The list of documents received by you for signing.

• **To sign:** Shows only the documents waiting for your signature. (Clicking the “Your signature is Required” box displays the same list.)

• **Waiting for others:** The list of your Sent documents which have not been completely signed yet. (Clicking the “Waiting for Others” box displays the same list.)

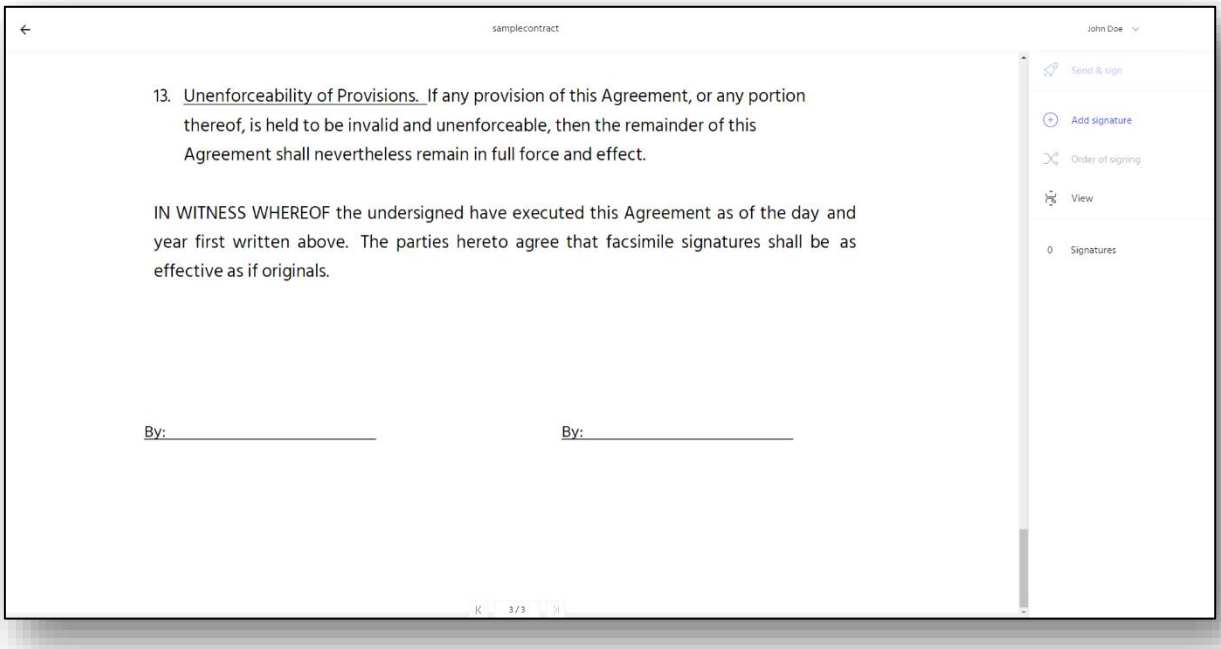
• **Completed:** Documents that have all signatures affixed.

Please note: The dashboard is not automatically updated. To update drag down the grey part of dashboard, use your browser’s reload button or the F5 key.

Signosoft Workflow – Single Document

Drag and drop the PDF document that you wish to sign onto the dashboard. Alternatively, click the large “Upload a PDF Document” button, locate and select the PDF document you wish to sign on your device and click “Open.”

The screen will now display the Document Uploaded screen. You will briefly see a “Document Uploaded” status message when the uploading is complete.

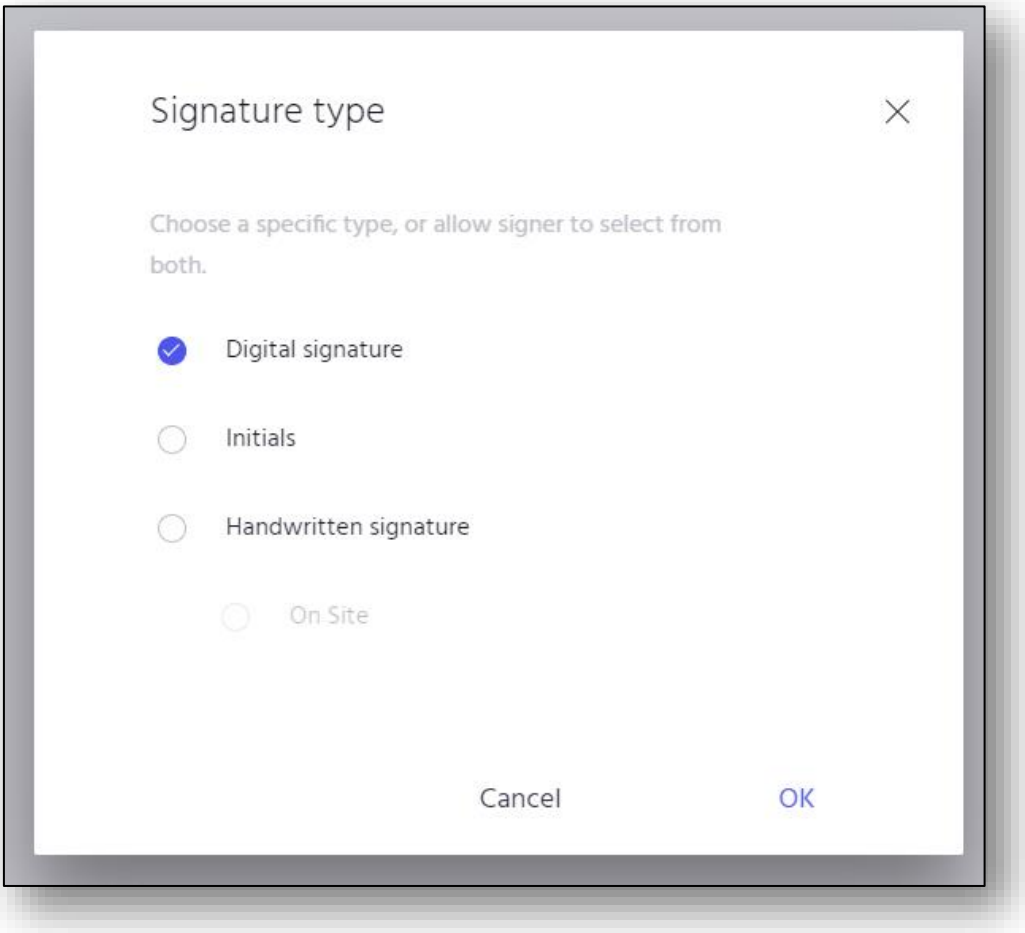


At the very top of this screen is the filename of the document and your Account links. Below that, the view is divided into two areas. The left area displays the document, and the right contains links.

Clicking the “View” link will change how the document is displayed onscreen. Either as a continuous scrolling page (like a website) or as single pages. To scroll through the single page view, click and swipe it in the direction you want to travel.

1. Add Signature

Scroll the document to the general area you want to add a signature. Click the “Add Signature” link. A window will pop up asking which type of signature you are requesting digital, handwritten (either user-based or on site), or initials.

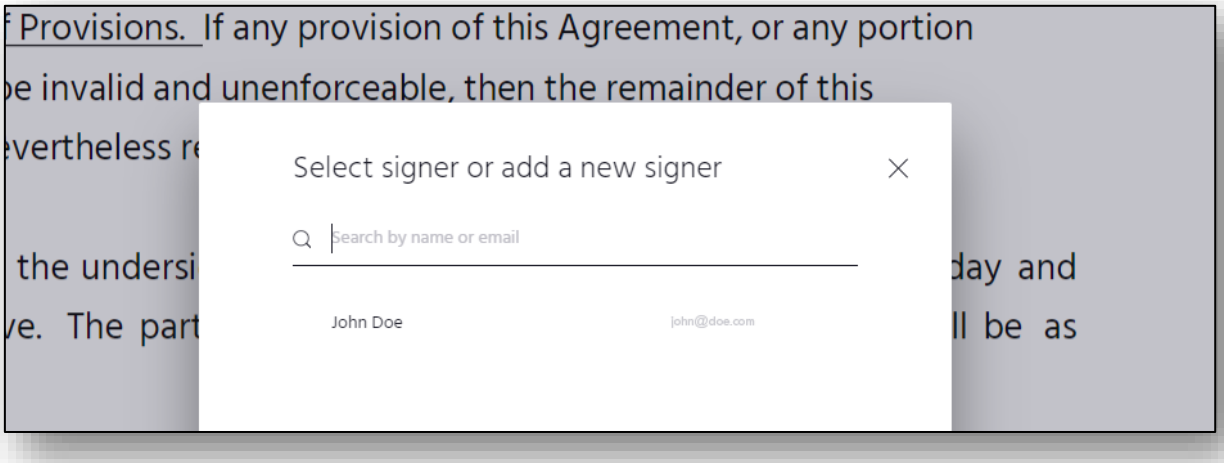


Please note: Initials are also accompanied by an electronic signature.

Add a checkmark next to each type that you are allowing. For example, if you want the signer to decide which type of signature they will use, then check all three options and click “OK.”

2. Select Signer

Next, you must select a signer. You will be shown a new pop-up window with a list of Signosoft users that you have already contacted.



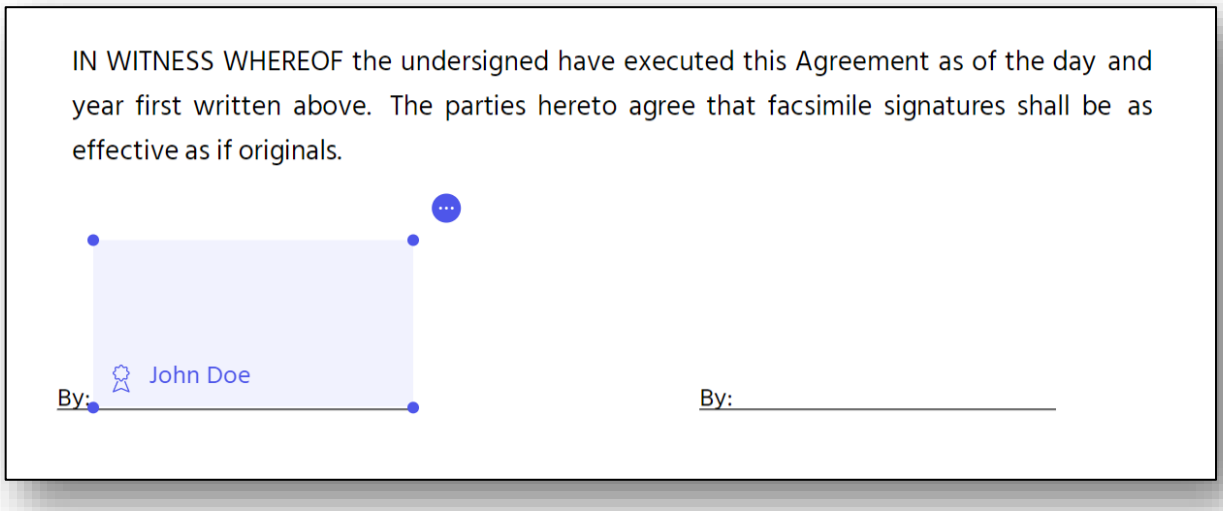
You can select from this list or enter any email address into the search field. If the person does not have an account, click the "Add new user" link that displays.

You will need to enter the person's first and last name before you click the "Add user" button to add them to the system.

As signers are added to a document, their names will appear below the links.

3. Position Signature

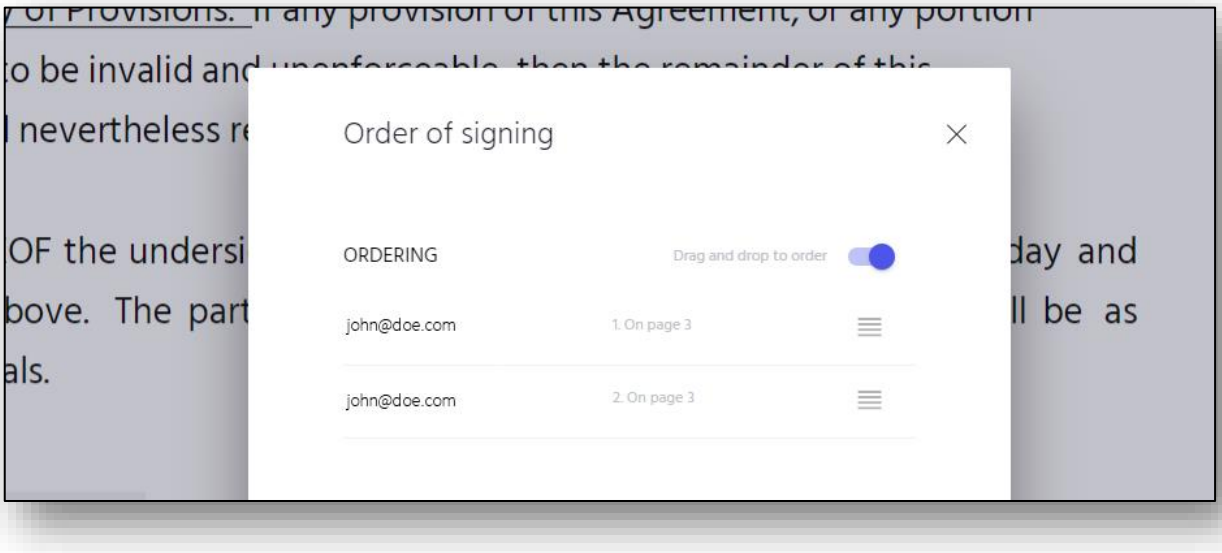
You will see a box with the signer's name in it in the document window.



Move the box to where you need it. Resize the box by clicking on a corner of the box and holding down the left button of the mouse. The Option button (three dots) will let you change the signature type and signer, or delete the signature.

4. Set Order of Signing (optional)

If the order of signing is important, click turn on the “Order of Signing” link to set who will sign first, second, and so on.



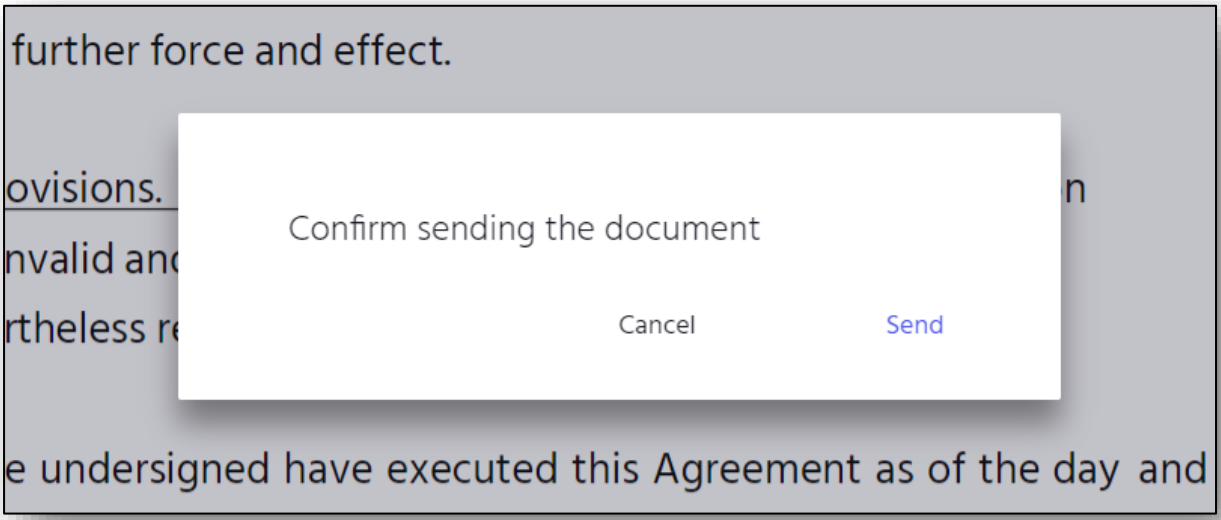
First, click the “Ordering” toggle button, and then re-order the list by dragging the signer’s names with their “hamburger” icon.

If you change the signing order, the order of the signatures below the options links will update.

If it doesn’t matter to you which of your signers signs first, leave ordering off.

5. Send & Sign

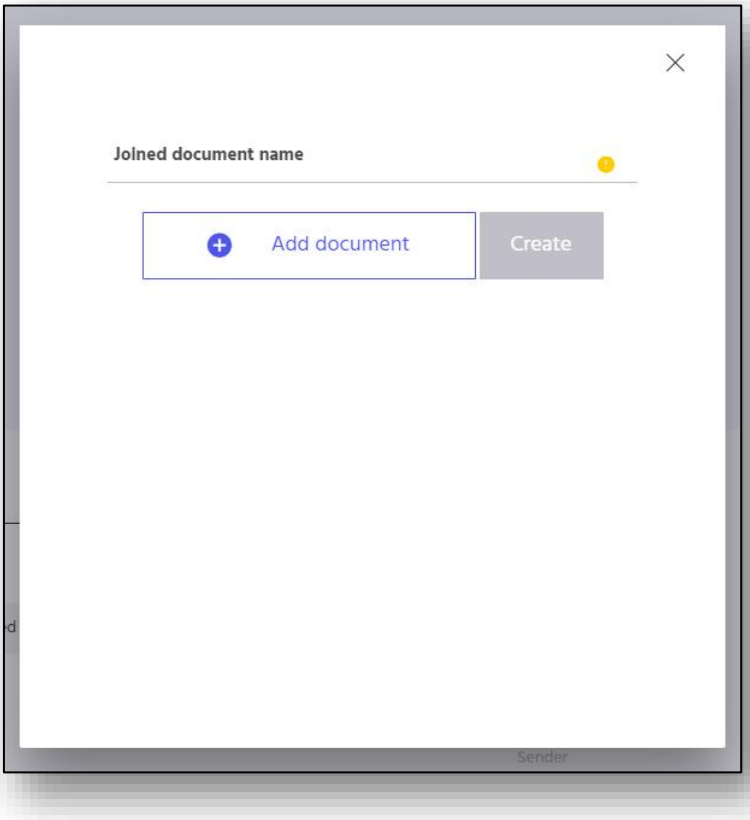
When your document is ready, click the “Send & Sign” link at the top of the options.



You will be asked to confirm and after you do, your document will be sent off to be signed.

Signosoft Workflow – Joined Document

After clicking Join documents button, the following menu appears:



In this menu you are required to name the joined document.

By clicking “Add Document” you can add any number of documents into the joined document. ¨

Documents uploaded into this menu can be deleted or arranged in any order.

By clicking “Create” a joined document will be created for signing.

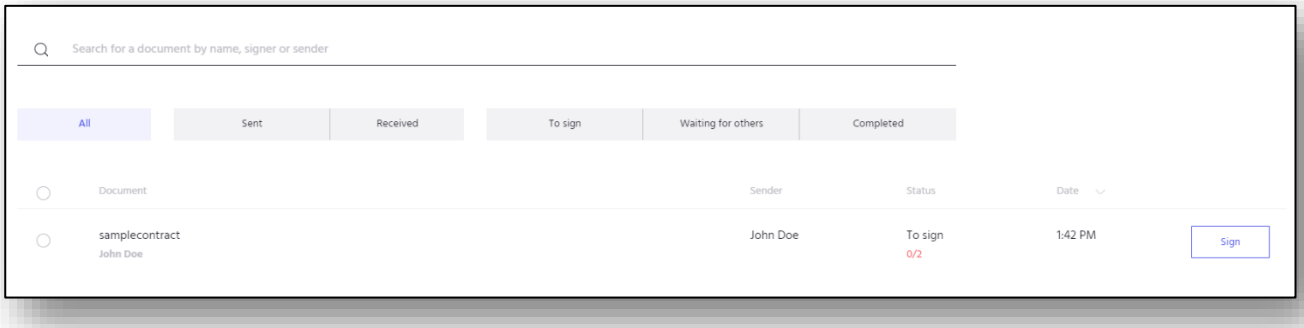
Please note: Creating a joined document does not physically merge PDF files together. Documents are only displayed together in the signing workflow but remain as separate files.

The signing workflow for a Joined Document is the same 5 steps described for a Single Document above and signing itself below.

You can use section “document(s)” in the right-hand menu to navigate between documents.

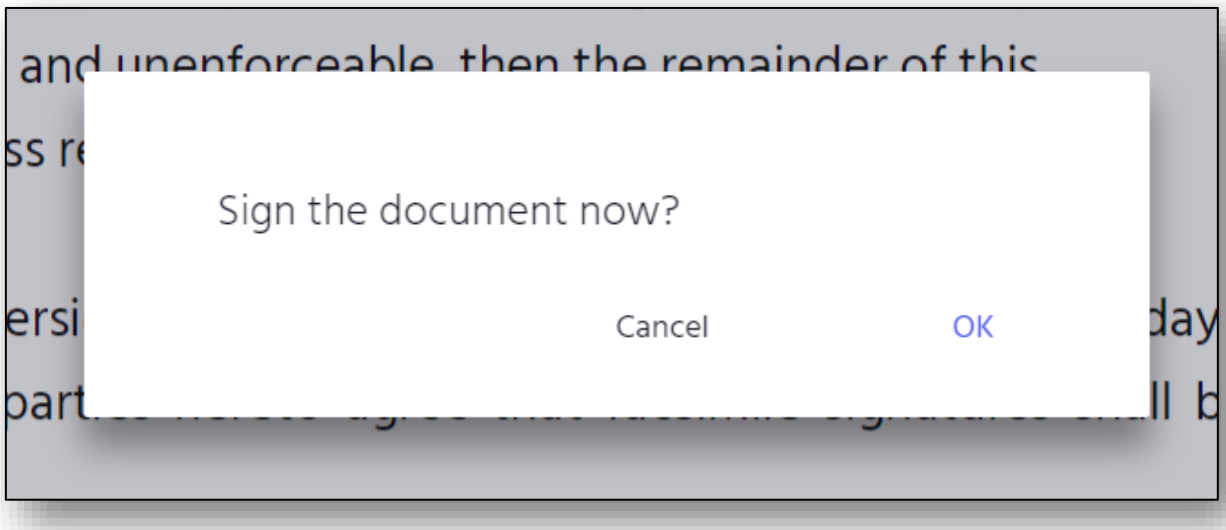
Signing a Document

When you receive a new document to sign, it will appear in the Dashboard Documents area. Click a document's "Sign" button to sign it.

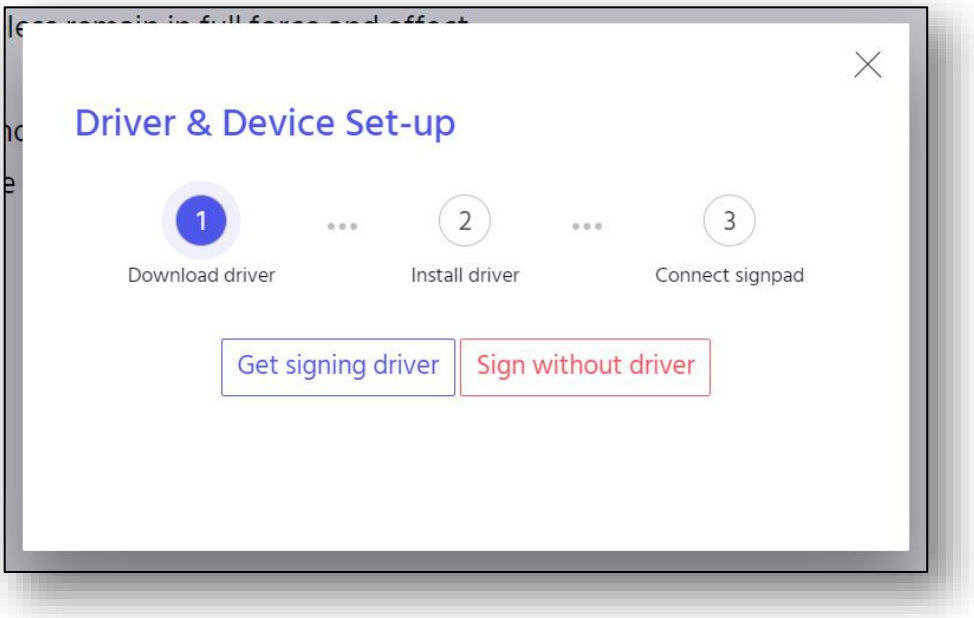


Digital Signatures

To sign a digital signature, just click "OK" to sign.

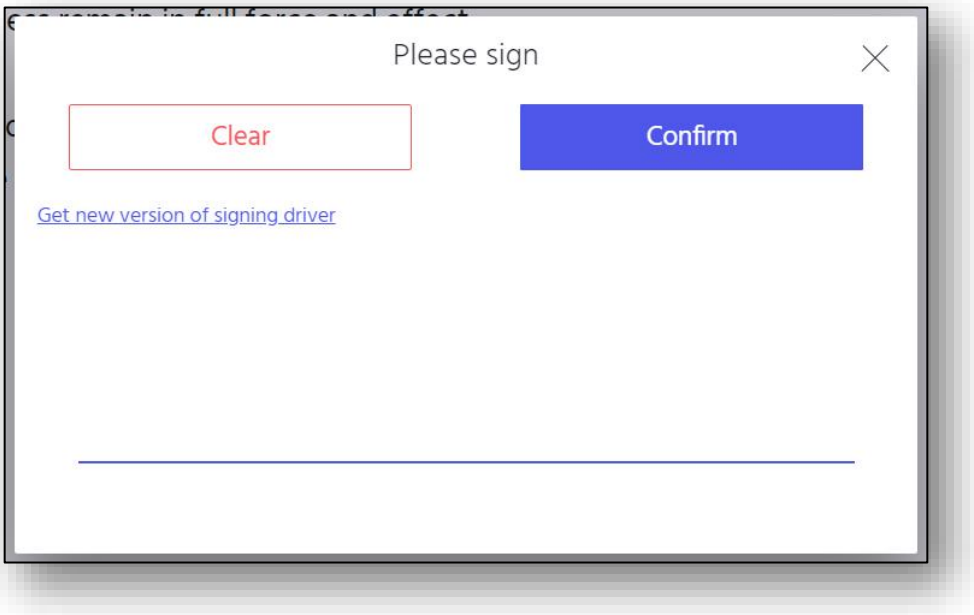


Handwritten Signature



Appropriate software driver is required for you to use your signature pad. Click “Get signing driver” to download and install it. After the installation, your pad should work as expected.

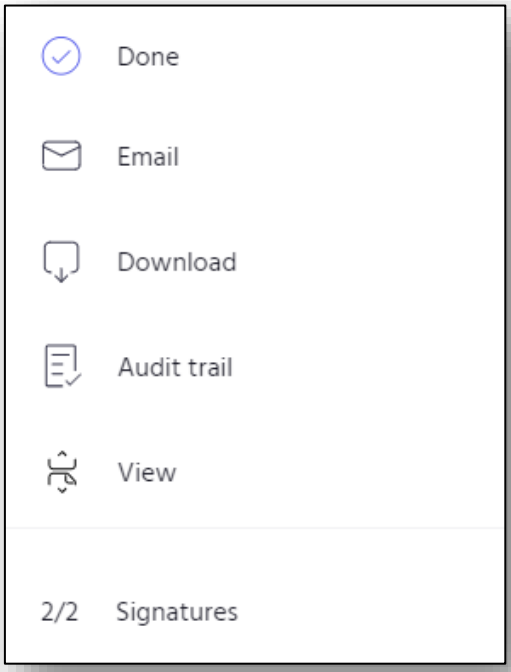
If you do not have a signature pad or do not wish to use one, you can select “Sign without driver” and use your mouse or finger in case you have a touchscreen on your device. Move the cursor together with a mouse button click to draw your signature or draw one with your finger on the touchscreen.



Sent Document Options

After your document is sent to all requested users or you have received the document it is accessible from the “Dashboard Documents Area”. You can open the document by clicking the filename or the “View” button (if you were included as a signer and have not signed the document yet the “Sign” button is visible instead).

While viewing the document there are several new links on the right side.



- **Done:** Closes the document view.
- **Email:** By clicking this link you can send the document via email as an attachment.
- **Download:** Downloads the document in PDF format.
- **Audit trail:** Downloads a PDF “Document report” a security-relevant chronological record of your document. It contains all critical information about the document, such as ID, Hash and State in which the document is and evidence of the sequence of activities that have affected the document including IP addresses. This is highly useful tool if there is a possibility of future dispute.