

A Quick-Start Kit

Handbook to getting yourself set up

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SIGNORITY

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Introduction


Getting signatures online is what Signority is for. Many of our clients have asked for an all-in-one document that contains all the info they need to use our service. This is it. This Quick-Start kit contains all the info you need to get signed online, plus a few other useful tips and tricks to help you maximize Signority's capabilities.

Getting Started

Creating Electronic Signature Documents

Before you begin, you'll need two things:

- A document to send (preferably in PDF format but almost any other file format will work); and
- The names and emails of the signers for that document

Start by clicking the  button and then **"New Document"** to start creating a new document.

1. The **"Upload"** page: if you have a document that has PDF form fields or anchor text, you need to select those options first before uploading your document. This will let the system know to upload while searching for those options. With or without Upload Options, upload or drag and drop the file you want to use to create electronic signature documents. A message will appear when a document is successfully uploaded and will be listed on the right-hand side. When you're finished, click **"Next"** or **"Add My Recipients"** buttons to continue to the next step.

The screenshot shows the 'Upload' step of the Signority Waiver Form process. The interface includes a progress bar at the top with steps: Upload, Recipients, Editor, and Send. The main area has a 'Drop files here' box with an 'UPLOAD FROM COMPUTER' button. A message below says 'Whoo-hoo! Signority Waiver Form.pdf was uploaded successfully!'. On the right, there's an 'Uploaded Files' section showing the uploaded document and an 'Upload Options' panel with checkboxes for 'Import PDF form fields as Tags', 'Add tags automatically based on PDF anchor text', and 'Optimize PDF resolution'. Numbered callouts (1, 2, 3) point to the 'Upload Options' panel, the 'Drop files here' box, and the confirmation message respectively.

2. The “**Recipients**” page: Using **ADD RECIPIENTS**, you can add as many signers as you need for a workflow. The “**Signing Order**” option lets you create a sequence for your signers and further customize the workflow to fit your needs. When you’ve added your signers, personalize the invitation email to your signers by changing the email subject line and body message to suit your needs. When you’re finished, you can also set up some recipient and document settings on the right, such as setting up your automated reminder schedule and capturing page view evidence from your signers. When you’re done, click “**Next**” to edit the document to capture the electronic signature and any other information from your signers!

The screenshot shows the 'Recipients' step of the Signority Waiver Form process. The interface includes a progress bar at the top with steps: Upload, Recipients, Editor, and Send. The main area has a 'Recipient' section with a table for adding signers. The table has columns for 'Signing Order', 'Name', 'Email', and 'Status'. Two signers are listed: 'Alison Wonderland' and 'Kevin from Signority'. Below the table are 'ADD RECIPIENTS' and 'ADD ME' buttons. A message below says 'Send a custom message to your recipients'. On the right, there's a 'Recipient Settings' panel with sections for 'Recipient Reminder Settings' and 'Document Settings'. Numbered callouts (1, 2, 3, 4) point to the 'ADD RECIPIENTS' button, the 'Email Subject' field, the 'Send reminders to recipients' checkbox, and the 'Document Settings' panel respectively.

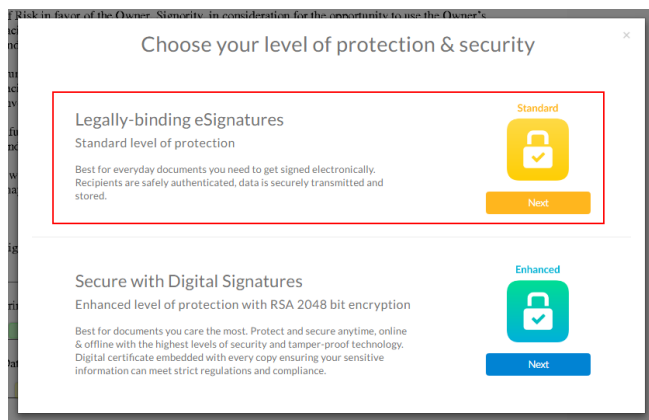
- On the **Editor** page, you will see the document you uploaded, as well as the signers listed on the left. You can change them if there were any mistakes or differences. At the top of the page, you can also customize the document settings.

The screenshot shows the Signority Editor interface. At the top, there's a blue header with 'Signority Sample Waiver Form | Settings' and a button to 'Customize the document settings here if needed'. Below the header, a progress bar shows 'Upload', 'Recipients', and 'Editor'. The left sidebar contains 'Files' (with 'Signority Waiver Form' and an 'Edit' button), 'Recipients' (with 'Alison Wonderland' and 'Kevin from Signority' and an 'Edit' button), and 'Tags' (with a list of tag types: Sign, Initial, Text, Note, Date, CheckBox, Radio, Dropdown, Attachment). The main area displays the document text, which includes a 'SIGNORITY' logo and a 'WAIVER AND ASSUMPTION OF RISK' section. A red box highlights the 'Recipients' section with the text: 'Your document and signer information are here. You can change them at anytime by clicking on Edit next to the appropriate section'. Another red box highlights the 'Tags' section with the text: 'Drag and drop the tags from here onto the page. Make sure tags are assigned to the correct signers!'. A third red box highlights the 'NEXT' button with the text: 'Send off the document by clicking Next whenever you're finished'.

- Finally, once the document settings are finalized, drag and drop the tags from the left onto the screen. Use the drop down menu after selecting a tag to change who the tag is assigned to. The tags will change color to indicate different assigned signers. Also notice that after you change a signer for one tag, the following tags will be assigned to them as well.

The screenshot shows the 'Tags' sidebar on the left and the document content on the right. The 'Tags' sidebar lists: Sign, Initial, Text, Note, Date, CheckBox, Radio, Dropdown, Attachment. The document content shows a 'Signature of Signature' field with a dropdown menu set to 'Alison Wonderland'. Below it is a 'Printed Name of Customer' field with a 'Text' tag assigned. Below that is a 'Date:' field. A red box highlights the 'Text' tag with the text: 'Drag and drop tags and select tags to assign them to other signers'.

- When you're finished assigning tags to all your signers, review the document and then click **Next** to finish up the design process. When prompted, select the standard electronic signature option.



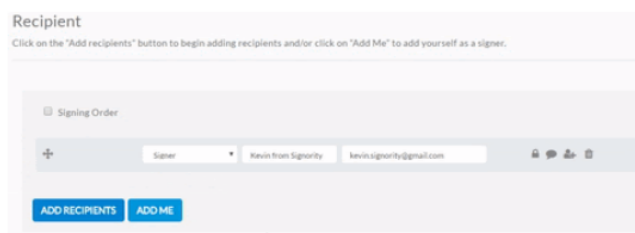
6. When it's successfully sent, you will be taken to a **Congratulations** page to confirm that it was sent properly.

Electronically Signing Documents for Yourself

Electronically signing a document for yourself is a simple and easy process with Signority. It's similar to when you would create electronic signature documents for others, but with fewer steps to simplify the process even further. To get started, use the **+New** button and select the **New Document** option.

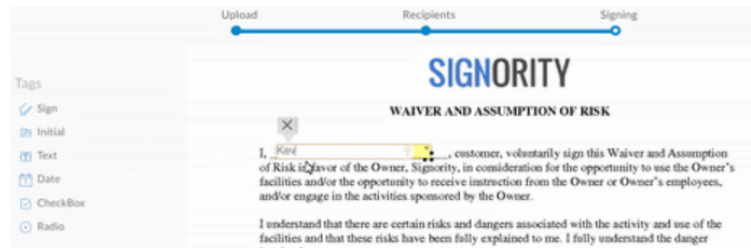
Step by Step to Electronically Signing Documents for Yourself

1. On the **Upload** page, use the **UPLOAD FROM COMPUTER** button to bring up the browser and search your computer for the document you want to electronically sign. When you're finished, go to the next step.
2. Once you've uploaded the document, you'll need to add yourself as a signer on the **Recipients** page. Use the **ADD ME** button to add yourself as the only signer.



3. After adding yourself, disregard the rest of the **Recipients** page. You do not need to customize a message or set a reminder schedule because you are the only signer and you will be re-directed directly to the signing page. When you're ready, go to the **Next** step.

4. Now, since you're the only signer, rather than being directed to the **Editor** page like you normally would, you go straight to the signing page.
5. Drag and drop the tags into place and fill it in immediately as you go (this is where things differ from the normal document creation workflow)



6. Add the signature tag then click on it to bring up the signing box. You can draw, type, or upload your signature. Once you've added all the tags and have filled them in, click on **Finished** in the top right and the document will be finalized.

You will receive an email with the final copy or you can download it directly from your **Documents** page.

Tags

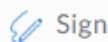
Tags are what allows your signers to modify and add information to the document. Having a good understanding of what each tag does will help simplify the process when you create eSignature documents.

To get started, here's the list of tags that are available for use with Signority. We'll go over each tag's function, settings, and what it looks like on the user end.

The following tags are available in Signority:

- Signature
- Initials
- Text fields
- Notes
- Dates
- Checkboxes
- Radio buttons
- Dropdown menus
- Attachments

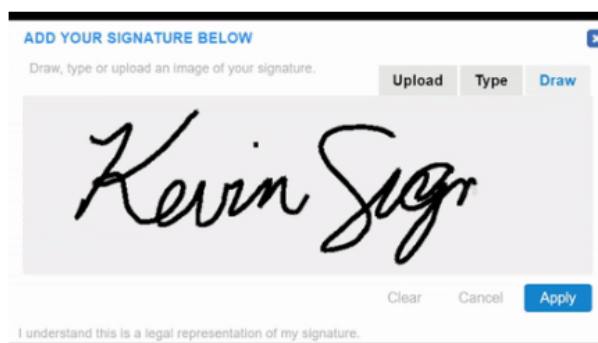
Signature Tags



Signature tags allow recipients to add their signature to a document. Signority allows for three signature methods by default—drawing a signature, typing a signature, and uploading a picture of a signature. You can also create your default signature design for one-click signing. There aren't any settings other than whether to make a signature tag mandatory or optional by using the cogwheel when the tag is selected.



When the document is sent out and the recipient is ready to sign, they need to click the signature tag. The signature window will appear and the signer has the option to **Draw**, **Type**, or **Upload** their signature. Then they will click **Apply** when they have finished their signature to add it to the document.

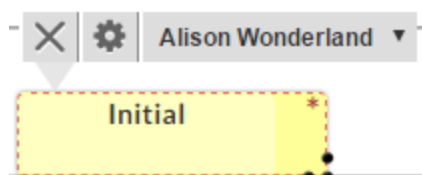


Initials Tags

SN Initial

Initials Tags are often used on documents to prove that the signer has viewed and read a page (though Signority has other options for this use case).

Initials function the same way as signatures. The settings are also the same, where you can change whether it is mandatory or optional.

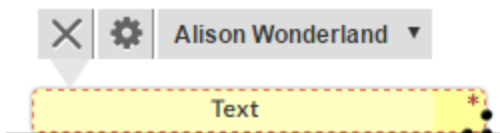


For the signers, they can click on it to bring up the signature window and can **Draw**, **Type**, or **Upload** their initials, similar to how it works for signature tags.

Text Tags

T Text

Text tags allow your signers to input information into a document, such as their name, address, or email.



The settings for text tags are fairly simple. You can make a tag optional or change the font size to match your document.

Name

Font size

Required ☒


For signers, they simply need to click on the tag and begin typing to enter the appropriate information for the document.

Printed Name of Customer

Kevin from Signority

Note Tags Note

Use Note tags to leave instructions on the document for individual signers. These can act like sticky notes for you to leave for your signers. You can assign them to specific signers so that they are visible only to that person.

  Alison Wonderland ▼

You can leave messages for specific signers. Think of this as a sticky-note you can leave around the document.



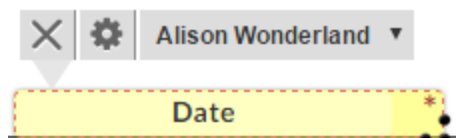
The settings for this tag is the same as for text tags, where you can change the font size, but there are no mandatory or optional settings for this tag.

For the signers, they will see the same information you typed in and when the document is completed, the tag will disappear from the finalized document.

Date Tags



The date tag is an easy way for your signers to date their signature or parts of the document. The default date format is MM/DD/YYYY.



To change the date's format, click on the date tag and then the settings cog that appears above. In the settings option, you can change the font sizing to match your document, as well as change the date format to one better suited for your document. Of course, you can also set the tag to optional.

Settings ×

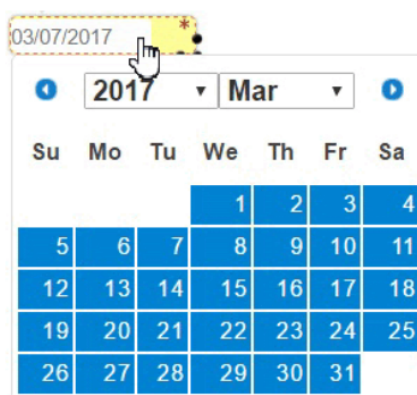
Name

Font size

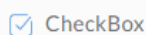
Date format

Required ☒

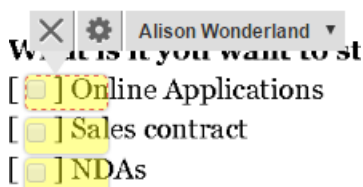
For signers, the date tag is simple to use. Click it once to add the current date, and a second time to bring up a calendar to select a past or future date.



Checkboxes



Checkboxes are great for collecting multiple choice information from signers. This is great when the question allows signers to select more than one option. By default, checkboxes are optional, but you can set them to “Required”.



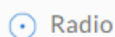
The checkbox settings are straight forward, you can select different styles of checks, between a checkmark, dot, and cross, for whatever your needs are. Just click on the settings cog when selecting a checkbox tag and bring up the settings window.

Under **Styles**, select the most appropriate indicator and then click **Save**.

When the signers are using checkboxes, the styles will be applied to the finalized document. The style will not be visible as the signer is using the checkbox on the signing page directly. The finalized PDF, however, will show the style you selected when preparing your document.

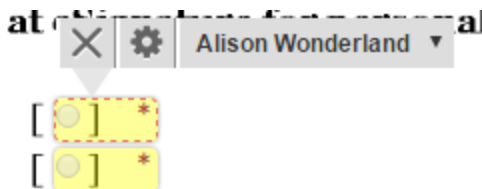


Radio Tags



Radio

Radio tags are useful when you have an either/or question, such as gender, education, etc.



When you drag a radio button over, you'll first be asked how many buttons will make up the group. The signer can only select one out of that grouping of radio tags. You can tell which radio tags are grouped together because the name of each tag will be the same. This means that if you entered the wrong number of buttons, you can add more by changing the names of the radio tags from the 2nd group to match the first.

Create Radio Buttons

×

Group Name

Radio_7

Number of Buttons

3

Required

☒

You are about to create a radio button group. A user can only select one button among a group of buttons.

✓ Add

⌕ Cancel

Because these radio tags are grouped together, when they're mandatory, one of the tags in the group must be selected by the signer to satisfy those settings.

For the signer, they simply need to click on the radio that is next to the best answer.

Dropdown Menus



Dropdown

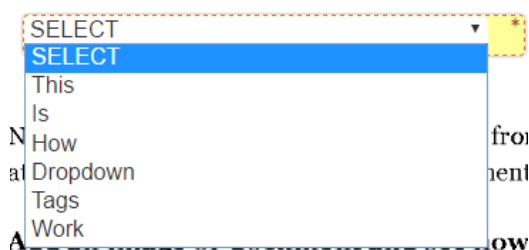
Dropdown menus allow a signer to choose one option from a list that you create. This is great for things like selecting which province or country someone is from, or which features or options are best for the signer, etc.



To set the options available in a dropdown, click on the tag in the document and then the settings cogwheel. Under the **Values** section, enter each option in separate lines, and each line will become a selectable option for your signers. You can also change the font size or make the tag optional as well. Once you're done, click **Save** to continue.

 A screenshot of a 'Settings' dialog box. It has a title bar with 'Settings' and a close button (X). Inside, there are three sections: 'Name' with a text input field containing 'Dropdown_10'; 'Font size' with a dropdown menu set to '12pt'; and 'Values' with a text area containing the following text: 'This', 'Is', 'How', 'Dropdown', 'Tags', 'Work'. Below the text area is a 'Required' checkbox which is checked. At the bottom, there is a note: 'Enter each drop down option on a separate line.' and two buttons: 'Save' (with a checkmark icon) and 'Cancel' (with an X icon).

When the signers use the dropdown menu, they will see the options you designated and can then select the most appropriate one for the document.

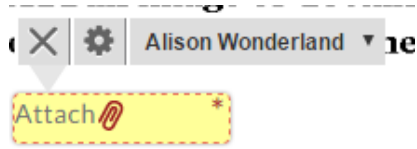


Attachment Tags

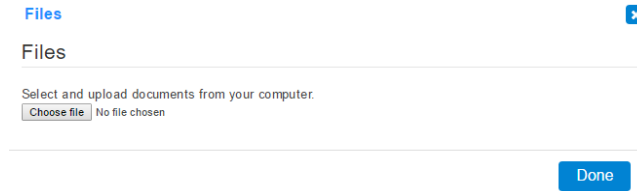


Attachment tags allow signers to upload and attach files to the document. This is really useful for accepting void cheques or bank statements, etc.

A signer can only add one attachment per tag, so if you need multiple documents from them, multiple tags will be required. You can make them optional if you wish.



For signers, when they click the attachment tag, the **Files** window will pop up and allow you to upload a file from your computer.



When the file is successfully attached, the paperclip will disappear and be replaced with a checkmark as seen below.



All successfully attached files will be added as a new page at the very end of the document and will be included in the finalized document.

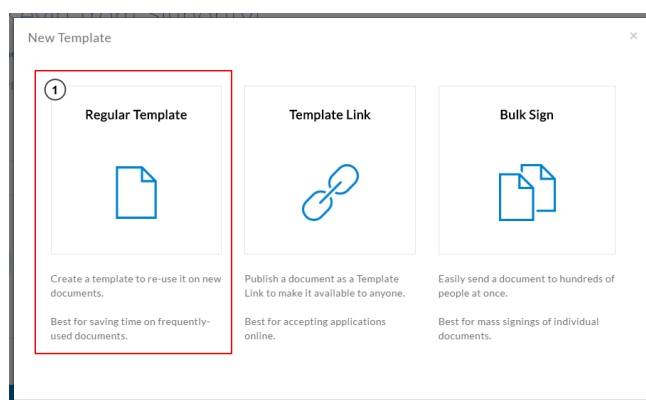
Creating and Using Templates

Signority's electronic signature **Templates** can save you a great deal of time with frequently-used documents. With just a few clicks, you can easily send pre-prepared documents out to your signers whenever you need it. Here's a step-by-step breakdown of how to create and use a template.

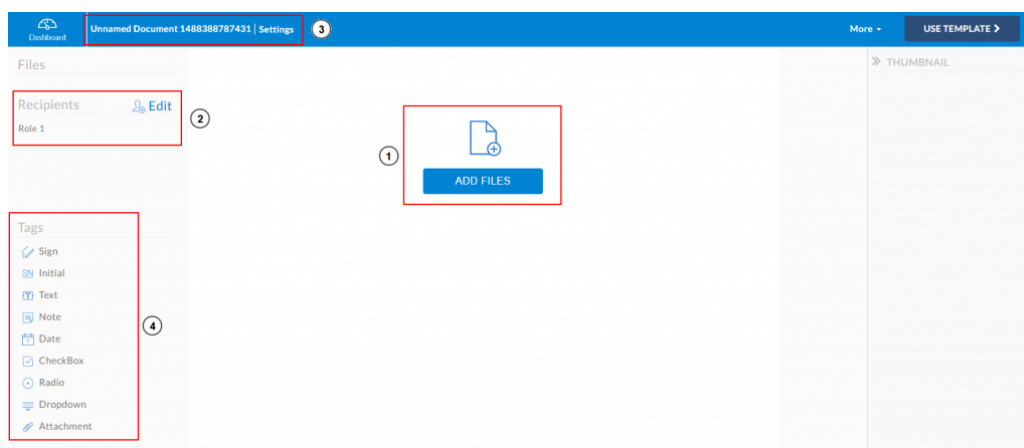
Creating Electronic Signature Templates

To create a template, click  and then **New Template**.

When prompted, click on the **Regular Template** icon.



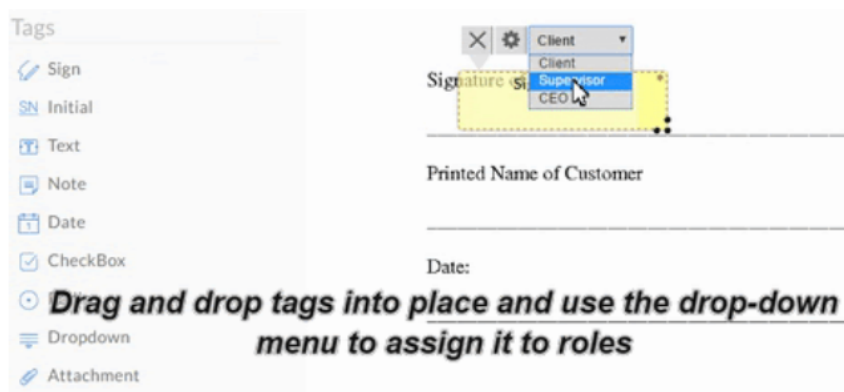
Creating a template is the same as creating a Document, but there are few things to keep in mind. First, is that you are taken directly to the **Editor** page, unlike a document, where you start on the **Upload** page.



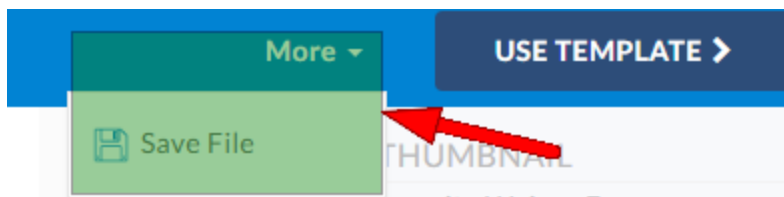
1. Begin by using the **Add Files** button in the middle to upload the document you wish to use for making the Template
2. Click on **Edit** in the Recipients section to edit the Roles of your signers. Since this is a template, you will not be specifying the signer's name and email like you did with a document. That will be added when you use the Template. Instead, create roles so you know whose name and email goes where, such as Client, Supervisor, or CEO. Add a signing order if you want to sequence your signers.



3. Once you've created the roles for your template, go to the **Settings** in the top left and edit any email messages or notifications settings you want. This will become the default settings for your template, so whenever you use it, the document will have those settings as well.
4. Finally, drag and drop **Tags** from the left and assign the tags to the correct roles by using the drop-down menu after selecting the tag. Continue through the rest of the template document.



5. Once you're done tagging, click on the **More** option in the top right next to the **Use Template** button. Select the **Save File** option to make sure all your changes are saved. When you're finished, you can close the window or go back to the Dashboard.

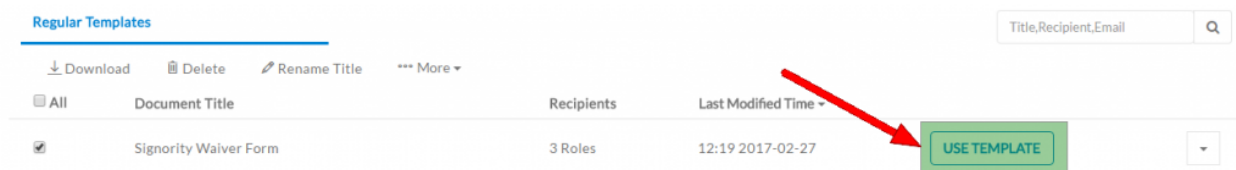


You've now finished creating the first of many electronic signature templates! For all your commonly used documents, try creating templates to save time!

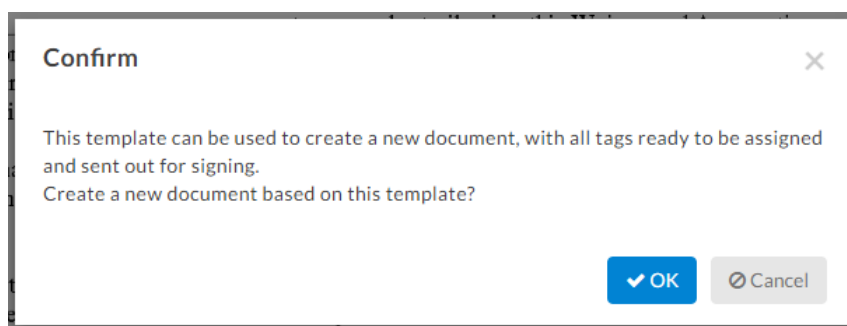
Using Electronic Signature Templates

There are two ways to use a template you've created.

1. From the **Editor** page where you were setting up the template. Where you clicked **More>Save File**, instead click the **Use Template** button; or
2. Go to the **Templates** page from the **Dashboard** and then click the **Use Template** button to the right



3. After you click on the **Use Template** button, you'll be prompted with the following message. Just confirm the creation of a **New Document** and you will be redirected to the **Editor** page to prepare for signatures.



4. Since the template has already set up the document with the tags, the only thing you need to do is click **Edit** next to the recipients, and then replace the Role names with the signer's actual name and email. Please make sure that the roles are **replaced** with the names and emails of the signer to automatically assign the tags to them. If you add new signers (i.e

using the **Add Recipients** or **Add Me** buttons), make sure to add new tags that are assigned to them.

When you're happy with the document, you can just click **NEXT >** in the top right to send the document for electronic signatures. And you're finished!

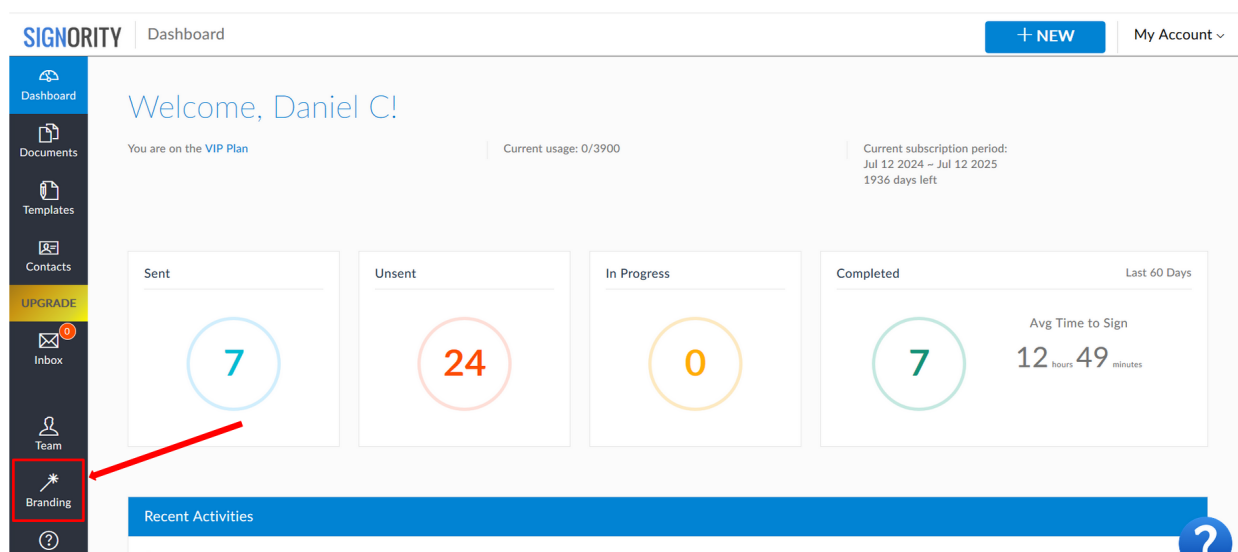
Company Branding and Email Message Customization

Company Branding allows you to take control and add your company logo to Signority's email notifications and on the document signing page. *Branding & customization is available to all team Plan users.*

Setting up Company Branding

As a Team Administrator:

- Click on **Branding** at the left hand side of the dashboard



- On the Company Branding page, there are a few things that are customizable.

Company Name

☒ Use Company Branding

Company Logo in the Email Header
(suggested size: 200px*83px)

upload company logo image here

Company Logo on Signing Page
(suggested size: 140px*48px)

Email Footer

Email Signature

Email Tagline below Logo

Edit the rest of the email here, such as adding in your company signature, or tagline below the logo, or use the email footer from company emails, etc.

☒ Enable PDF Encryption

Signer Help Content

Using Company Branding

Company logos can be used in email notifications and on the signing page for your documents. You can upload images of any size, and Signority will resize them as needed. Just check the **Use Company Branding** option and then upload the image of your logo from your computer. The logo for the email header will be shown in the invitation and notification emails. While the logo for the signing page will be shown for when they access the signing page and for the template link access page.

Customizing Email Content

The email footer, email signature and email tagline in all email notifications can be customized through Company Branding. This will be applied to all your team members.

Team Management

When you sign up a team plan for your corporation, you can add unlimited users to your team. There are four different roles that you can assign to team members depending on their role in your company. The roles are: Billing Admin, Super Admin, Team Admin, and Regular User. Each role has its own permissions privileges (see below). Teams and subteams are an efficient way to share documents and templates with people in your company and manage document access controls. Note that subteams are typically only available to Premium Plan and above, but as of March 13, 2020, it has been made available to all plans due to the coronavirus outbreak.

Team Account Roles and Permissions

Here is a breakdown of all the permissions that each team role possesses.

Regular Users

- Configure **Document Sharing** for their account through **Profile Settings** under **My Account**
- Configure **Template Sharing** for their account through the **Profile Settings** under **My Account**
- Access their own documents and templates, and shared documents and templates in their subteam through the **Profile Setting** under **My Account**
- View their subteam's activities

Team Admins

- Add regular users to their subteam
- Set up logos for their subteam
- Generate API keys for integrations
- Configure **Document Sharing** for their subteam through the **Team Global Profile Settings**
- Configure **Template Sharing** for their subteam through the **Team Global Profile Settings**
- Access their own documents and templates, and shared documents and templates in their subteam through the **Profile Setting** under **My Account**
- View their subteam's activities

Note that Team Admins are always placed within a single subteam.

Super Admins

- Add subteams, regular users, and team admins.

- Manage plan and overage payment setup
- Set up logos for the root team and all subteams
- Generate API keys for integrations
- Configure **Document Sharing** for the root team and subteams through the **Team Global Profile Settings**
- Configure **Template Sharing** for the root team and subteams through the **Team Global Profile Settings**
- Access their own documents and templates and shared documents and templates in the root team through the **Profile Setting** under **My Account**
- View root team and all subteams' activities

Billing Admins

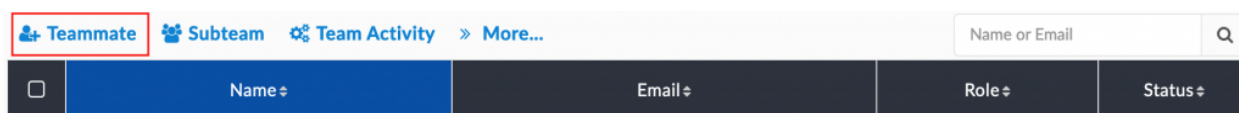
A Billing Admin has the same permissions as a Super Admin, but can also:

- Add Super Admins to the root team
- Add and change the credit card information through the **Payment Method** under **My Account**
- Manage plan and overage payment setup

Add a Teammate

This step must be done by the Team Admins, Super Admins or the Billing Admin. If you allow a user to sign up for a paid account on their own, they will not be able to join your team without help from our backend support team.

Click on the **Team** option from the left side **Navigation** bar. On the **Team** page, click the **"Teammate"** option.



You'll be prompted to enter the **Email Address**, **Role** and **Team Name** of the new teammate. You can get more details about [team account roles and permissions here](#). When you've entered the information, click **OK**. You'll then be asked to enter the team member's first and last name.

New Team Member ×

First Name

Last Name

Email Address

Role

Regular User

Team Name

Demo

✓ OK

⌕ Cancel

An account and temporary password will be sent via email to the person you invite. If they already have an account, they'll receive an invitation via email, and will join the team after they accept it.

Moving a Teammate from One Team to Another

This step must be done by the Billing Admin or a Super Admin.

Click on the **Team** option from the left side of the **Navigator** bar from the dashboard menu. On the **Team** page, click the “**Edit**” option.

Edit Teammate ×

Name

4test esign

Email Address

4testesign@gmail.com

Change the role → Role

Team Admin

→ Team Name

HR

Move to another team

Assign shared file(s) to

4test esign

You can only transfer the ownership of shared file(s) to the current teammate.

✓ OK

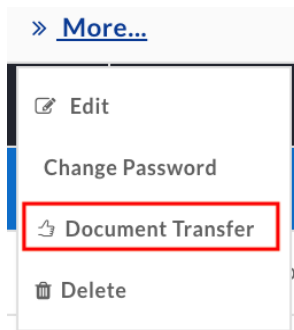
⌕ Cancel

When the teammate is the owner of shared documents and shared templates, the ownership must be transferred to the current team before you move her/him.

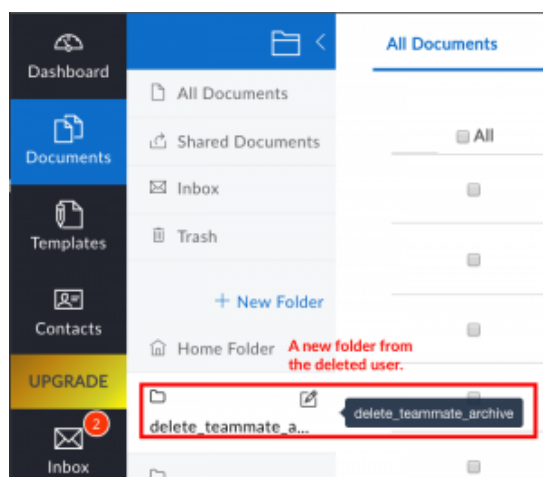
Deleting a Teammate

This step must be done by the Billing Admin, Super Admin or Team Admin.

Click on the **Team** option from the left side of the **Navigator** bar from the dashboard menu. Transfer out or delete documents to empty the account first. You can transfer documents to anyone in the account including yourself.



Documents and files will be transferred to the designated user's account in a folder in their Documents page.



Simply confirm that you wish to delete the team member from the team.

Confirm



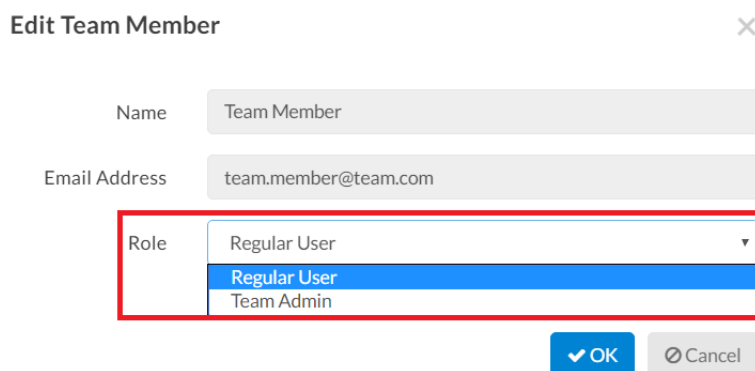
The following team member will be removed from your team: "Team Member".

✓ OK

Cancel

Edit Teammates

You can also edit the roles of team members if necessary. You can give a user Super Admin, Team Admin capabilities. Go to the **Team** page and select a team member. Click the **Edit** option and in the window, use the drop-down menu next to **Role** to edit their account access.



Dialog box titled "Edit Team Member" with a close button (X). The form contains the following fields:

- Name: Team Member
- Email Address: team.member@team.com
- Role: Regular User (selected), Regular User, Team Admin

Buttons: OK, Cancel

If you want to transfer accounts to a different user, you will need to ask the user in question to log in and change their **Account Name** and **Email** from the **Profile Settings**. The new user can reset the password and have full access to the old account.

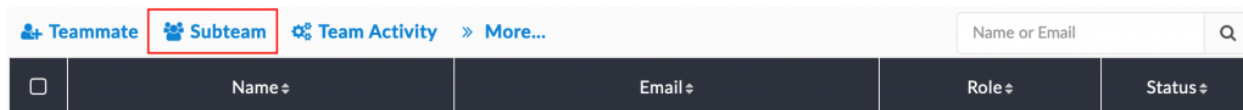
Subteams

Creating a subteam allows you to share documents and templates among subteam members, making it easier for your subteams to efficiently manage document access control. The team Billing Admin, Super Admins, and Team Admins can manage subteams and teammates. This feature is available to any plan at or above the Plus Plan.

Create a Subteam

Subteams can only be created by a Billing Admin or a Super Admin.

To create a subteam, click on the Team option from the left side of the Navigator bar from the dashboard menu. On the Team page, click the "+Subteam" option.



Navigation bar: Teammate, Subteam (highlighted), Team Activity, More...

Search bar: Name or Email

	Name	Email	Role	Status
--	------	-------	------	--------

Then enter the team name to add a new subteam.

A dialog box titled "New Team" with a close button (X) in the top right corner. Inside the dialog, there is a label "Team Name" followed by a text input field containing the text "HR". At the bottom right of the dialog, there are two buttons: a blue "OK" button with a checkmark icon and a grey "Cancel" button with a close icon.

Delete a Subteam

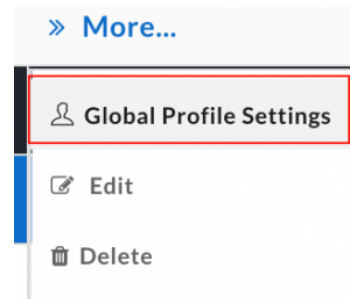
This step must be done by the Team Billing Admin or a Super Admin.

You can delete a subteam when there is no teammate in it. Either delete or move teammate(s) to other teams before deleting the subteam.

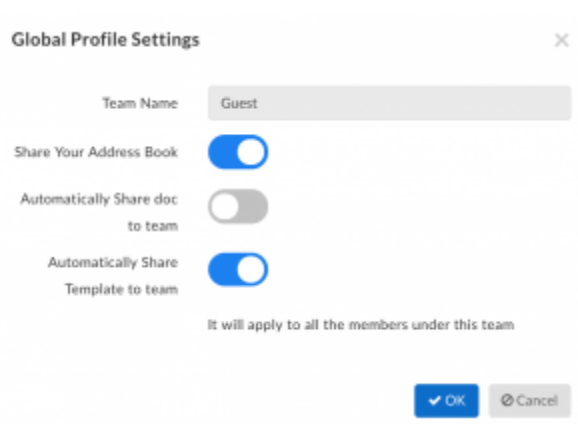
Team Global Profile Settings and Document Sharing Settings

Global Profile Settings are one of Signority's team management capabilities.

Billing Admins and **Super Admins** can configure settings for users in the root team and subteams. **Team Admins** can only configure settings for users in the subteam that they are in. Configurable settings include reminder email settings, document expiry settings, and document and template sharing settings. Global Profile settings can be accessed through **Team** located in the left side of the **Navigator** bar. Select the team(s) that you want to configure default settings for.



Below is an example of configuring **Document and Template Sharing** settings for “Guest” team users by a **Team Admin**.



Any user can change some of the settings from their own **Profile Settings** under **My Account** if they wish to have their own document **reminder** and **expiry** settings. Document sharing settings cannot be modified from a user's personal **Profile Settings**. The same settings can also be modified by any user for individual documents through **Settings** in the document designer page.

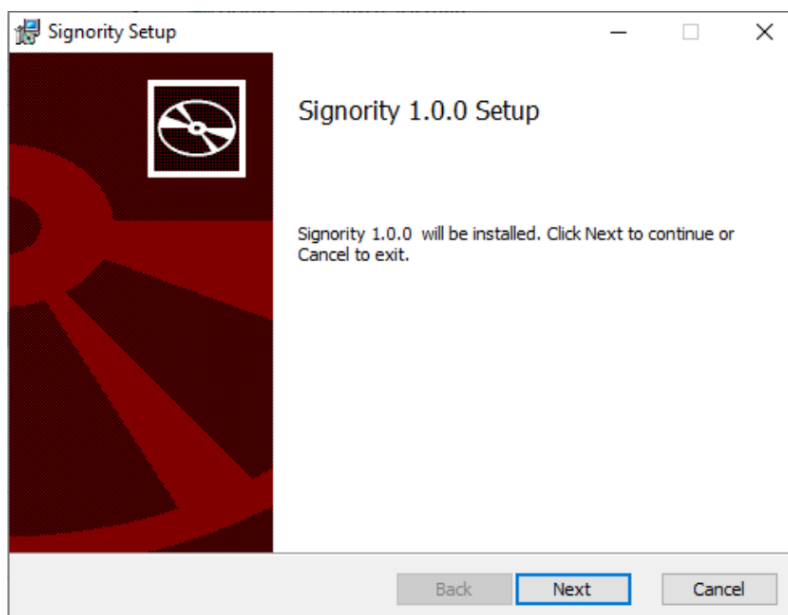
Signority Printer Driver

The Signority Printer Driver allows you to upload documents to your Signority account without having to exit your desktop application. Uploading documents to Signority using this printer driver works like printing to a printer, but you're printing to Signority. Here's how to install and use Signority's printer driver.

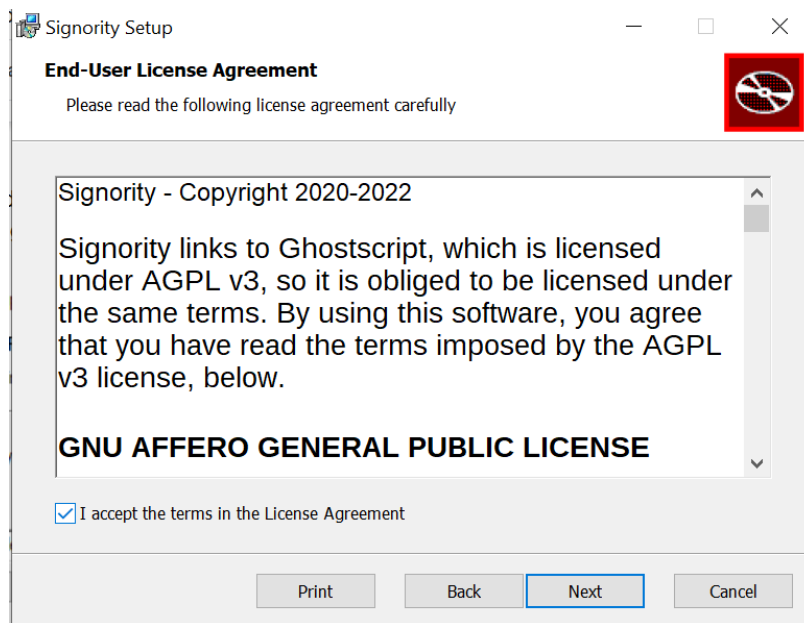
Installation

First, download the Signority Printer Driver Installer Package to your desktop. The Installer Package can be found at <https://www.signority.com/signority-printer-driver/>. There is both a Windows 32-bit download and a Windows 64-bit download. Choose the one that is compatible with your desktop environment. Note that the Signority Printer Driver acts like a program instead of an actual printer, so if your company is using a server to host user terminal servers, or if you have a print server that regular users cannot access, you can install the Printer Driver on each individual user terminal server. Otherwise, it can be installed on a print server or other server.

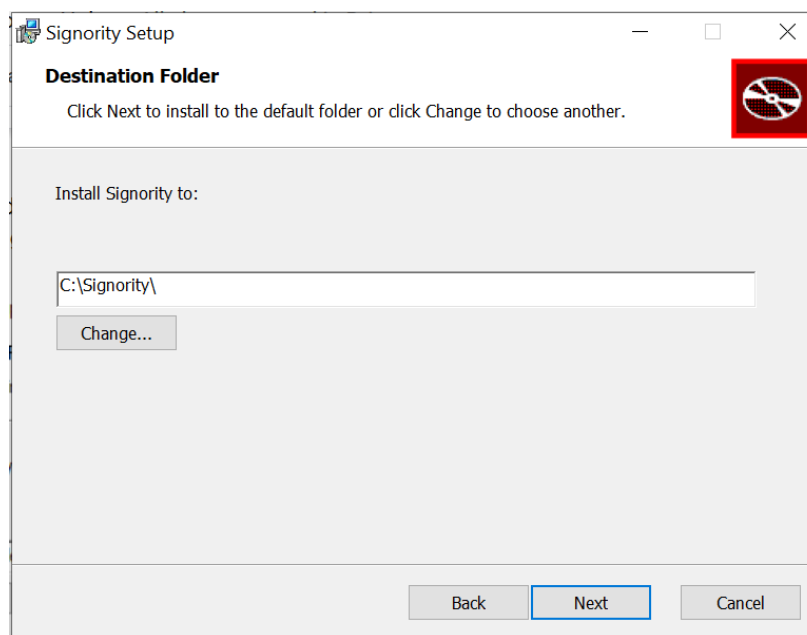
Once you've done that, open the file to launch the installer. If you're using Windows, you might get a warning sign saying that Windows protected your PC. In this case, click on "More Info" and press "Run Anyway". Then you will be taken to the installer UI.



After clicking next, a window with the end-user license agreement will show up. Read the agreement and check the "I accept" checkbox to continue.



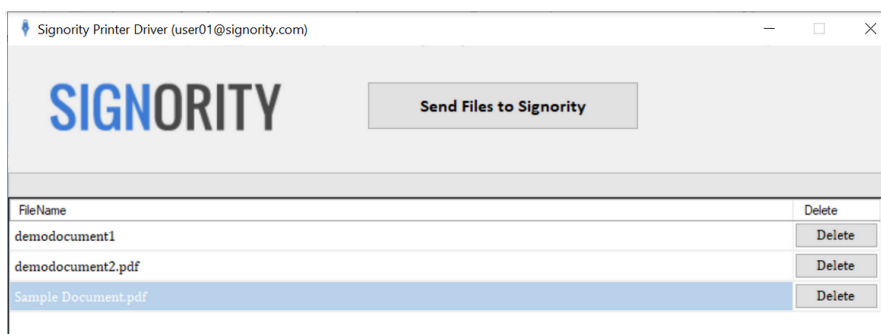
You will then be able to set where you want to install the application. The default location is C:\Signority\.



From here, finish the installation process. Make sure to restart your computer, and the printer driver will be ready to use.

Using the Signority Printer Driver

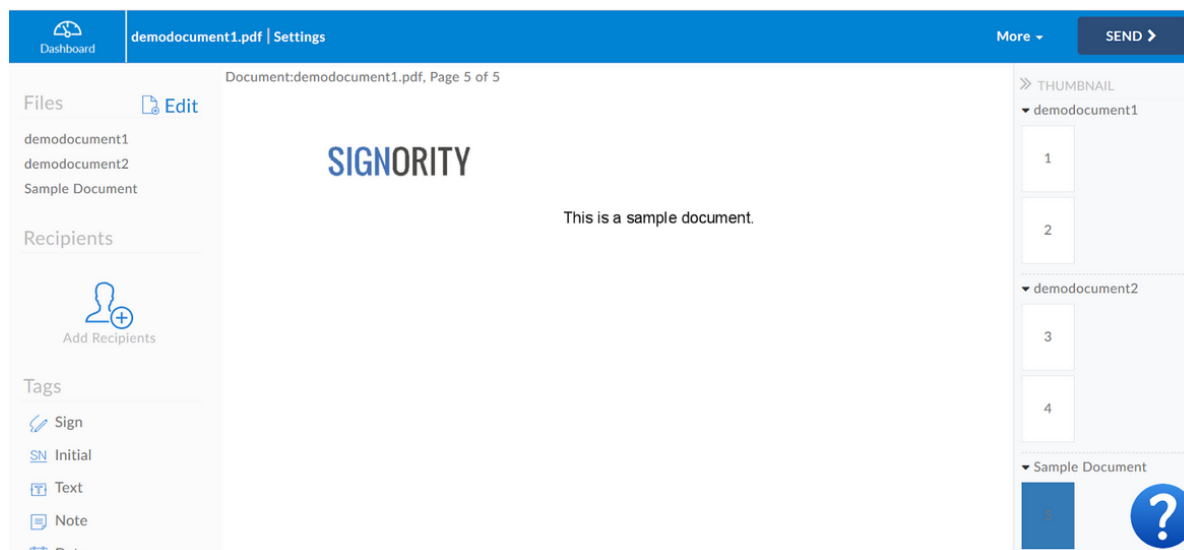
There are two ways to print to Signority. The first method is very simple. It works exactly like a regular printer. Open the file you want in any document viewer/editor and click “Print” (or **Ctrl+P**) like you normally would when printing a document. Then, select Signority Printer as your printer and click “Print”. This should open the Printer Queue window where your document will appear. You can also drag and drop documents from your File Explorer directly into the Printer Queue window. The first time you use the printer driver, you will need to enter the username and password of your Signority account. If you need to, you can print multiple documents into the Printer Queue at a time.



You can also rename the documents by double-clicking on them, and delete documents by pressing the “Delete” button. Note that you are not allowed to modify the document’s extension. For example, if a document is a PDF document, you cannot change the “.pdf” extension to something else. Doing so will cause an error.

Once you have all your documents in the Printer Queue, click “Send to Signority as a document”. This will group the documents in the queue as a single Signority document and send it to Signority.

From here, you will be taken to the Document Editor page in your account where you can edit your document for signing.



Printing Documents from 3rd Party Desktop Software

If you are using a 3rd party desktop software, such as Taxprep or Caseware for accountants, you can print documents from these applications directly to Signority. After you install the Signority printer driver, you should see it listed in the 3rd party software Printer tab. When you select multiple documents to print to Signority, some softwares may combine them into a single large document and send it to the Signority printer queue. Taxprep, for example, is known to do this.

Page View Evidence

There can be a wide variety of documents that require signatures. Sometimes, those documents require signers to agree and understand the full content and terms of the contract. In these instances, it's often common practice to require an initial on each page to confirm the signer has read and reviewed the page. With Signority, these documents can be simplified even further with the **Page View Evidence** feature.

This feature adds a checkbox to the bottom of every page that signers will have to mark off in order complete the document. This information then gets captured in the document history and helps prevent any issues regarding accepting the terms of the documents.

Using Page View Evidence

Page View Evidence can be turned on for specific documents while you're [creating a document for eSignature](#). To get started, create a **New Document** using the **+New** button in the **Dashboard**.

Upload the document you want to use and continue to the **Recipient** page. In the Recipient page, add your signers and [edit the invitation email content](#) if necessary. When you're setting the **Recipient Settings** in the right-hand column, the **Page View Evidence required** option should be visible there. Check it to turn the feature on for the document.

Dashboard | There are 2 recipients | NEXT >

Upload | Recipients | Editor | Send

Recipient

Click on the "Add recipients" button to begin adding recipients and/or click on "Add Me" to add yourself as a signer.

☐ Signing Order

ADD RECIPIENTS | ADD ME

Recipient Settings

Recipient Reminder Settings

☒ Send reminders to recipients

Send reminders every 7 days

Send a maximum of 3 reminders

☒ Page view evidence required. Signer needs to click on a checkbox to indicate that each page is reviewed.

Document Settings

Customize Document Settings

☐ Enable Digital Signature

Continue to the **Editor** page to add your tags. Here you will also have another opportunity to turn on Page View Evidence. Go to the **Settings** next to the **Document Title**. In the **Advanced Settings** tab, you'll see the **Page View Evidence Required** option. Turn it on if you didn't do it on the **Recipient** page.

Settings

Title and Email | Notifications | Advanced Setting | Signer Views

Advanced Setting

☐ Embed Digital Signature generated using HSM for this document.

☒ Page view evidence required. Signer needs to click on a checkbox to indicate that each page is reviewed.

Language: English

Save | Cancel

When you're finished adding all the tags, click **Next** to send the document off for signature.

Capturing Page View Evidence Information

For the signers, page view evidence is very simple. The process for [signing online documents](#) is the same for all signers. The only difference is that while you're signing, you'll be prompted for a checkmark with the text **"I have read the current page"**. Once you've checked the box, it won't be accessible to you anymore. Continue through the document and **Submit** when you're finished.



This information will then be captured in the document history. While you're monitoring your document status and history, you'll be able to see which pages they've read and reviewed. The information will also be shown in the **audit trail** in the finalized document.

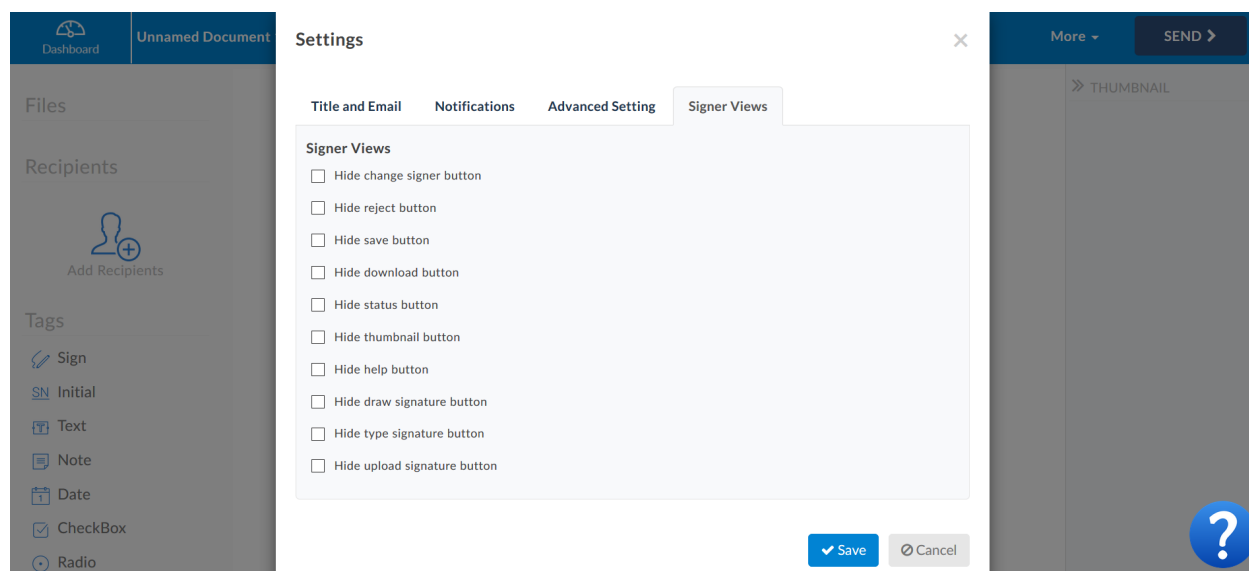
HISTORY

Timestamp	Name	Action	Email	IP Address	Notes
2017-03-14 18:09:41	Kevin from Signority	Document created by	kevin.signority@gmail.com		
2017-03-14 18:10:55	Kevin from Signority	Document sent by	kevin.signority@gmail.com		
2017-03-14 18:11:09	Alison Wonderland	Terms of Service accepted by	alisonwonderland@gmail.com		
2017-03-14 18:11:09	Alison Wonderland	Document viewed by	alisonwonderland@gmail.com		
2017-03-14 18:11:15	Alison Wonderland	Page viewed by	alisonwonderland@gmail.com		Page #1
2017-03-14 18:11:40	Alison Wonderland	Page viewed by	alisonwonderland@gmail.com		Page #2
2017-03-14 18:11:46	Alison Wonderland	Document signed by	alisonwonderland@gmail.com		

That's all there is to page view evidence. It's a simple feature but can be very useful depending on your document!

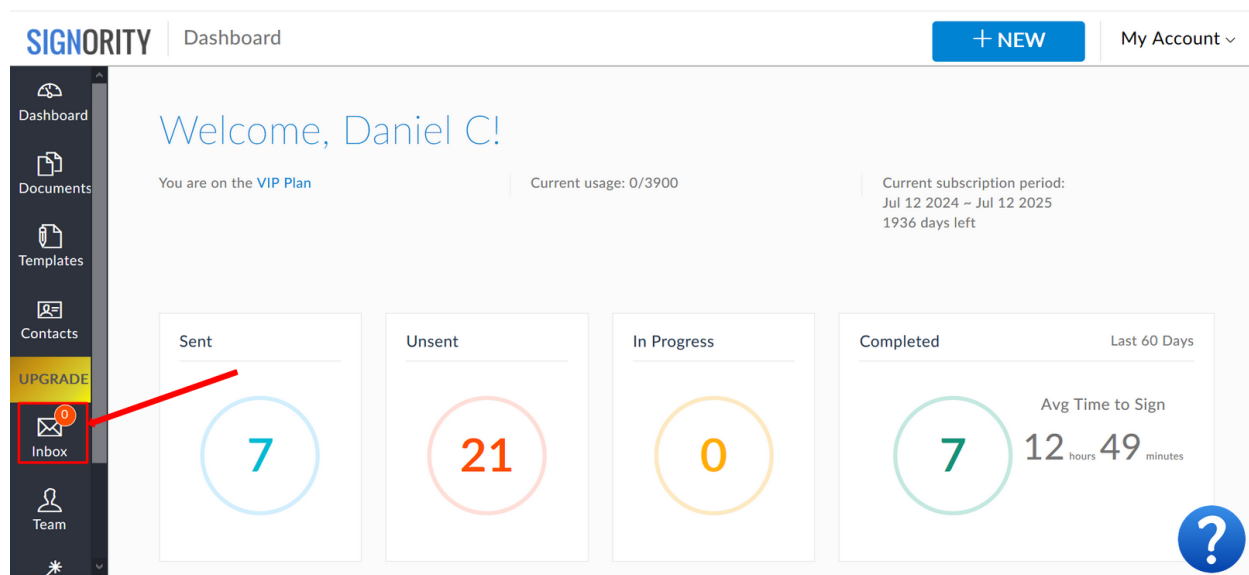
Signer Views (ex. Blocking Typed Signatures)

Signer views are settings that control the options that signers of your documents have when signing your documents. For example, one of the settings is to hide the "Type signature button". This would prevent a signer from typing in their signature. Such settings are particularly useful for industries that have specific requirements on the signing process. These settings are configurable under "Settings" → "Signer Options" in the Document Editor. Default signer views can also be configured under "My Account" → "Profile Settings" → "Account". Below is an image of the signer views settings that can be modified.



Signority Inbox Notifications

Signority has a built in notification system that allows you to get notifications on the status of your documents without your email. If you don't want to receive emails when documents have been sent out or finalized, but you still want to be notified, Signority's inbox notifications will let you do that. Your Signority inbox is located in the menu on the left side of your dashboard.



By default, document senders will receive emails when documents are sent out or finalized. You can disable these email notifications from My Account -> Profile Settings as illustrated below:

SIGNORITY My Account + NEW My Account ▾

Profile Account Password Two-Factor Authentication **Notifications** Integration

Enable help instruction ☒ Enable help instruction across the whole website.

Send reminder emails ☐ Enable reminder emails to the recipients if a document remains unsigned.

- Send a reminder email every day(s).
- Maximum amount of reminder emails to be sent is
- The document will expire day(s) after it has been sent.

Send "viewed" notification to document sender ☐ Send the document sender a notification when a viewer has viewed a document.

Send "signed" notification to document sender ☐ Send the document sender a notification when a signer has signed a document.

Send an email to the document sender when the document is completed: ☐ Attach a PDF of the final document.
☐ Provide a link to the final document.
☐ Send an email only.
☒ Do not send any email.

Send an email to document recipients when the document is completed: ☐ Attach a PDF of the final document.
☐ Provide a link to the final document.
☐ Send an email only.
☒ Do not send any email.

?

The above settings apply to all new documents. However, you can change the settings at individual document level through Settings on the document. These changes affect the current document only.

Settings

Title and Email Notifications **Advanced Setting** Signer Views

Notifications

- ☐ Send "signed" notification to document sender
- ☐ Send "viewed" notification to document sender
- ☐ Send an email with pdf attachment to the document sender when the document is completed
- ☐ Send an email with a download link to the document sender when the document is completed
- ☐ Send an email to the document sender when the document is completed
- ☒ Do not send any email to Sender
- ☐ Send an email with pdf attachment to document recipients when the document is completed
- ☐ Send an email with a download link to document recipients when the document is completed
- ☐ Send an email to document recipients when the document is completed
- ☒ Do not send any email to Recipients

☐ Send reminder emails

- Maximum amount of reminder emails to be sent is
- Send a reminder email every day(s)
- Warn the sender of document expiration day(s) before it will expire.

☐ Send a copy of all email notifications to the following address:

Expiration Notifications

FAQs

Are eSignatures legal?

Yes! In Canada, federal and provincial laws recognize electronic signatures as serving the same legal functions as a physical or “wet” signature. The Personal Information Protection and Electronic Documents Act (PIPEDA) passed in 2000 and sets out guidelines for the use of electronic signatures and expresses the fact that electronic signatures can be used as a substitute for “wet” signatures. Every province in Canada also has their own set of guidelines for the use of electronic signatures. In addition, certain industries have specific restrictions on the form that a signature must take. When considering using eSignatures, make sure to consult a lawyer to ensure that you are in compliance with industry standards. But for the most part, electronic signatures are legal and can be used as a substitute for physical signatures in almost any situation!

How is a document counted in Signority?

A Signority document is counted when it is sent out to recipient(s) for signature. A single document can contain multiple files, and incidentally, multiple pages. Some other eSignature vendors might call a document with multiple files an Envelope. In addition, the number of recipients does not matter. Signority does not count a document when it is uploaded to the Signority Cloud, whether through the Printer Driver, or from your desktop.

What are the benefits of Annual vs. Monthly plans?

There are two big benefits of using Annually paid plans:

- There is no monthly limit for annually paid plans. You can use the number of documents in any way you like within the twelve month period;
- You will receive a 10% discount.

What do I do if I receive a message from Signority saying “Your account reached 80%(or 100%) of its document count!”?

When your account’s document usage reaches 80% or 100% of your plan’s maximum, Signority will send you this message. If you are receiving these notifications early on during your subscription period, you may need to consider upgrading your plan. Remember that if you go over your plan’s maximum usage, you will be charged overage for every document above the maximum.



SIGNORITY

Website: www.signority.com

Online HELP: <https://www.signority.com/help/>

P: 1-833-222-1088 or 1-613-883-0762

E: support@signority.com