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ECHOSIGN OVERVIEW

SEND

To: Signers’ email addresses
Cc: Anyone who needs a copy
Name your document
Add a custom message

“Getting A Signature Has Never Been Easier”

Signature Options (What’s the difference?)
- e-Signature
- Fax Signature
- I need to add my signature to this document
- Preview, position signatures or add form fields
- Verify signer identity using a password
- Password protect the signed document

SIGNATURE OPTIONS

☐ I need to add my signature to this document
Click on ‘Change Order’ to change the order of when you sign.

☑ I need to add my signature to this document
Recipients sign first, then I sign last

Change Order
☐ **Preview, position signatures or add form fields**
   Check this box to place signatures, initials, and form fields in the document before sending it out for signature.

☐ **Verify signer identity using a password**
☐ **Password protect the signed document**

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**Password Protection**
The PDF file that you send to everyone will be encrypted and this password will be required to open it.

Don't lose your password as they are not recoverable. In the event that you do lose the password, you'll need to delete that transaction and begin again.

**Signer Identity Verification**
Ensure that before signers can view or sign the document, they have to verify access to their email account AND verify their identity.

**Signing Password:**
Require Signers to enter a one-time password you specify.
SIGN

Signer receives email notification about document to sign.

Signer clicks link highlighted in email.

Signer signs effortlessly from any web browser on any device.
FAX SIGNATURES

Print and sign the attached PDF document.

Please sign the NDA.
Amy Wang
Sent: Friday, May 11, 2012 3:24 PM
For: Amy Wang

Send. Sign. Done...

Amy Wang Has Sent You NDA to Sign.

Amy Wang (amwang) says:
"Please review and sign NDA."

Please print, sign and fax back the attached NDA. A cover sheet with my EchoSign fax number is included. After you sign the NDA, everyone will be e-mailed a signed PDF copy.

Do you need to forward this to a party authorized to sign it? Click here
Fax back using coversheet provided.
### TRACK & MANAGE

#### Signature Status
- Waiting for Signature
- Out for Signature
- Signed
- Cancelled/Declined
- Archived

#### Search
- By Person or Company
- By Signature Status
- By Document Owner
- By any input – email, sign date, notes field

#### Manage Tabs

**View.** See a thumbnail image of the document - then enlarge, review or print.

**Share.** Forward a copy of the document to anyone who needs it - supervisor, colleague or support staff.

**Remind.** Send a reminder to yourself or the recipient - once, daily or weekly.

**History.** View the history of all agreement events – who, when, what.

**Notes.** Add notes to the agreement record.
HOW TO USE ECHOSIGN

EchoSign is the web’s #1 electronic signature service allowing you to get your documents signed in minutes rather than days. EchoSign accelerates your document signing process with instant fax or e-signatures, tracks your team performance and their contracts’ status in real time and stores all your signed agreements. Learn more on http://www.echosign.com

WATCH A VIDEO

Watch this video to get a quick overview of how easy it is to use Adobe EchoSign:


SIGN UP FOR WEBINAR

Sign up for the Adobe EchoSign webinar to learn more about the benefits of using the service:


ADOBE ECHOSIGN SUPPORT PORTAL

Visit the Adobe EchoSign Support site to access many resources and helpful information including FAQs, Knowledge Base Articles, and Support:

http://www.echosign.com/public/static/support.jsp

Go to the Adobe EchoSign Knowledge Base to view step-by-step documentation and useful information about the service: http://echosign.force.com/knowledgebase

CREATE AN ACCOUNT

- To sign up for a free account, go to: http://www.echosign.com/public/register
- To learn more about Adobe EchoSign pricing plans and how to sign up for a free trial of an Team, Enterprise, or Global account, go to: http://www.echosign.com/public/static/cost.jsp?cs=mktg_topnav
- After you complete the registration form, check your email inbox for a verification email. Click the link to verify your email address and start using Adobe EchoSign.
- Sign into Adobe EchoSign from: https://secure.echosign.com/public/login?

THIRD PARTY INTEGRATIONS

Adobe EchoSign is also integrated directly with some third-party systems including Salesforce.com, NetSuite, Microsoft CRM, SugarCRM, Google Apps, and others. Go to http://www.echosign.com and click on the Product tab to learn more.
SEND DOCUMENT FOR SIGNATURE

- Go to the **Send** tab
- Input recipient email addresses
- Attach document(s) requiring a signature
- Select whether the document should be signed with an e-signature or by fax
- Choose any other Signature Options
- Click ‘Send’
POSITION SIGNATURES, INITIALS, AND FORM FIELDS

On the Send page, choose the option to position signatures or form fields.

- Drag and drop signatures, initials, and form fields to the desired locations on the document
- Click ‘Send’
SIGNED DOCUMENTS

Once the document is signed it is sent as a PDF via email to all parties to the transaction. A backup copy is also placed in your Adobe EchoSign account.

MANAGE DOCUMENTS

- Go to the Manage tab
- Search for a document using the drop down menus and search box
- Share a copy of the document with another party
- Set Reminders -instant, every day, or every week
- View History to find out when a document was sent out for signature, when a document viewed by the recipient, and when a document signed
- Add Notes to the agreement record
ACCOUNT MANAGEMENT

ACCOUNT SHARING

- Log into your account and go to the Account tab
- Under the section Account Sharing, go to View Other Accounts
- Add email address i.e. manager’s email
- Click ‘Request’
- An email will be sent to the email address entered to request account sharing

ACCOUNT SETUP – ADDING USERS

- Log into your Adobe EchoSign account and go to the Account tab
- Under the section Users & Groups, go to Create New User
- Add the user’s email address including first and last name
- Check the box ‘View Their Agreements’ if you want to view the activity of their agreements from your account
- Click ‘Create User’
- An email will be sent to the email address entered. User will then activate their account.
ACCOUNT VIEWING, USERS

View what documents are out for signature, what has been signed, when and by whom.

ACCOUNT VIEWING, MANAGERS

Administrators can also go to the Manage tab to view document statuses for their team members. Select “Filter by Document Owner” and chose the agent whose contracts the Manager wishes to view. This assumes that account sharing has been setup ahead of time.

SUPPORTED FILE FORMATS

EchoSign supports the following file formats:

- PDF
- Microsoft Word (.doc and .docx)
- Microsoft Excel (.xls and .xlsx)
- Microsoft PowerPoint (.ppt and .pptx)
- WordPerfect (.wp)
- Text (.txt)
- Rich Text (.rtf)
- Graphics (.jpg, .jpeg, .gif, .tif, .tiff, .bmp and .png)
- Web (.htm or .html)

You can also upload files directly from your Google Docs, Dropbox, Box.net, or Evernote accounts.
CONFIRMING THE DOCUMENT HAS BEEN SENT

EchoSign offers several ways to confirm that your document was sent for signature:

1. Check your email inbox for an email titled ‘[Document Name] has been sent out for E-signature’
2. On the Manage tab, highlight the document and check to see if a thumbnail of the document is visible.
3. Click the grey History tab and see if the document was sent
RECIPIENT HAS NOT RECEIVED THE DOCUMENT

1. Please have the recipient check their email spam filter to confirm the document was not flagged as spam. To avoid this issue going forward, have them add echosign@echosign.com to their email provider’s white list or to their own email address book.

2. Go to the Manage tab and send a Reminder. This will resend the document to the recipient.

START USING ADOBE ECHEOSIGN

Start using Adobe EchoSign to experience it for yourself. Send an agreement now and see how Adobe EchoSign can transform the way you do business and get contracts signed.