Complete your quote as usual, then select "Create eSign Order Form."

Enter the customer's email address into the "To:" field.

The email address entered into the "CC:" field will receive all eSignature notifications, and will be pre-populated with the email address of the Channel Manager associated with your account.

Select the order form to be signed, and click "Upload."

Send Proposal(s)

(Order forms will be sent in the standard format, unless specified) ☑ Create eSign Order Form
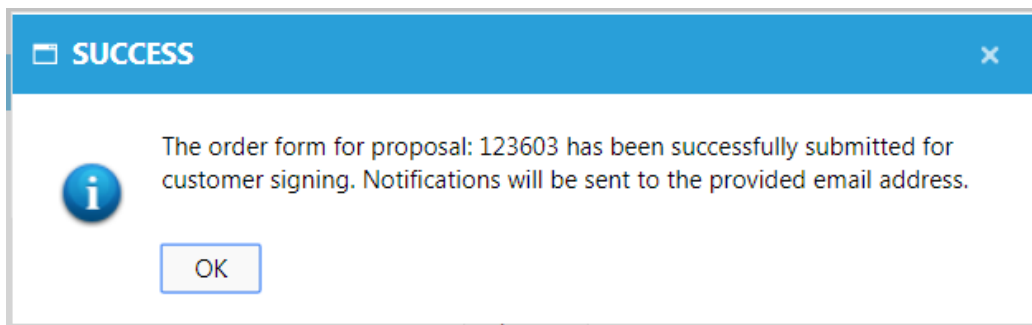
To: Customer@email.com

CC: ChannelManager@email.com

Upload

Proposal(s) to Send

Add Order Form	Proposal	Date Created	Connectivity Type	Service Type	Reference ID	Status	Proposal Actions			
☑	123603	11-Apr-2018	Managed Connectivity w/QOS (Incl. Internet)	Cloud Business Phone System		Finalized	Review	Clone	View PDF	Hide

You will receive the following notification to inform you that the upload was successful:

☐ SUCCESS   ✕

ℹ The order form for proposal: 123603 has been successfully submitted for customer signing. Notifications will be sent to the provided email address.

OK

Your CC: will also receive the following notification in their inbox:

SignNow

Open Document

A request to sign the order form has been sent to: JoeBurris@me.com

This email contains a secure link to SignNow designed for the initial recipient. Please do not forward or share this email, link, or access code with others. If you believe this email was sent to you in error, please contact the sender.

They can click "Open Document" to view the unsigned order form, but they will not be able to edit anything.

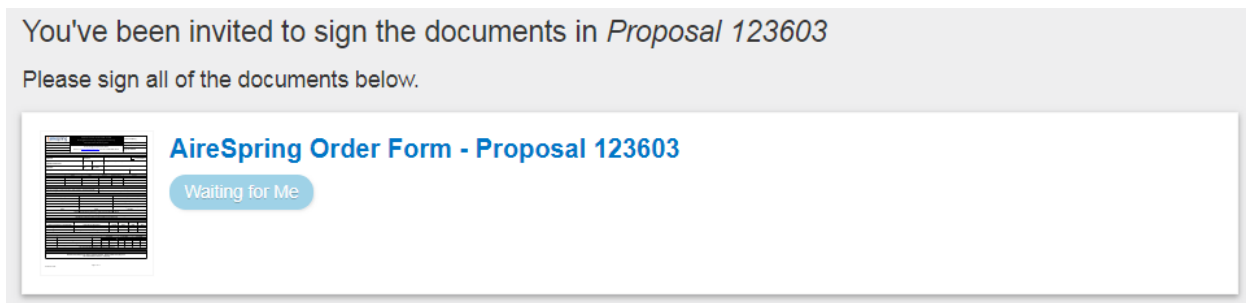The customer will receive this email allowing them to sign the document:

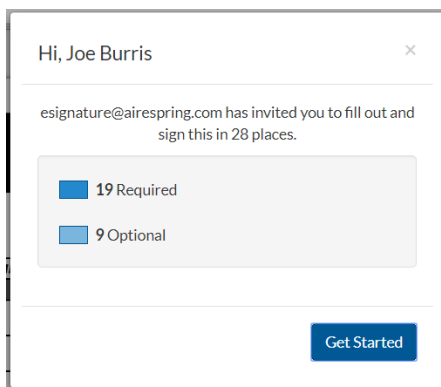## SignNow

Open Document

Please sign the order form to order your AireSpring service.

This email contains a secure link to SignNow designed for the initial recipient. Please do not forward or share this email, link, or access code with others. If you believe this email was sent to you in error, please contact the sender.

When they click "Open Document," they'll be taken to this page, where they will click the document they intend to sign:

You've been invited to sign the documents in *Proposal 123603*

Please sign all of the documents below.

AireSpring Order Form - Proposal 123603

Waiting for Me

The next window will show how many required and optional fields they will need to fill out, then click "Get Started."

Hi, Joe Burris   ✕

esignature@airespring.com has invited you to fill out and sign this in 28 places.

19 Required

9 Optional

Get Started

The top of the screen will show their signing progress, a "Guide Me" button to show them the next field, and an "Options" drop-down menu.

Under the "Options" menu, they will be able to download the document, decline to sign the document, or forward it to someone else for signature.

This is the method they should use to allow another person to sign the document, which I've illustrated below:

After selecting "Forward Invite" they'll enter the forwarding email address, and click "Forward Invite."

When the user is ready to sign, they'll click on every dark blue text field one by one, and enter the necessary information:

In the below example, they're being asked to enter their initials, which they can type or draw, then select "Add."

Signature fields will use the same method:

Text fields can be edited directly:

*Print Name

Date fields will default to today's date:

*Date

Light blue fields are optional fields, and aren't required to submit the document, although they may need to be filled out based on the customer's order (i.e. Letter of Agency):

*Signature of Applicant:	Signature Field	***Printed Name of Applicant:**	Name
*Date:	Date	***Title of Applicant:**	Title
Signing this document will result in a service provider change			

After the final required field is completed, the "Guide Me" button will change to "Done."

When they click "Done" they will be shown the following screen notifying them that it was successfully submitted, and that no further action is required on their part:

Document Group Status for *Proposal 110247*

All documents have been signed. There is nothing left for you to do at this time. You can review the documents in this group below.

Signed Documents

AireSpring Order Form - Proposal 110247
Signed

Close

The customer and the CC: will both receive a notification in their inbox to let them know that the document has been signed:

Fri 12/1/2017 4:12 PM
SignNow <mail@signnow.com>
Your Documents Have Been Completed
To   Joe Burris
Message   AireSpring Order Form - Proposal 110247.pdf (702 KB)

SignNow

You signed the **attached documents**.

Use SignNow on iOS, Android, and the web.

The signed order form is then automatically forwarded to Order Entry to be processed.