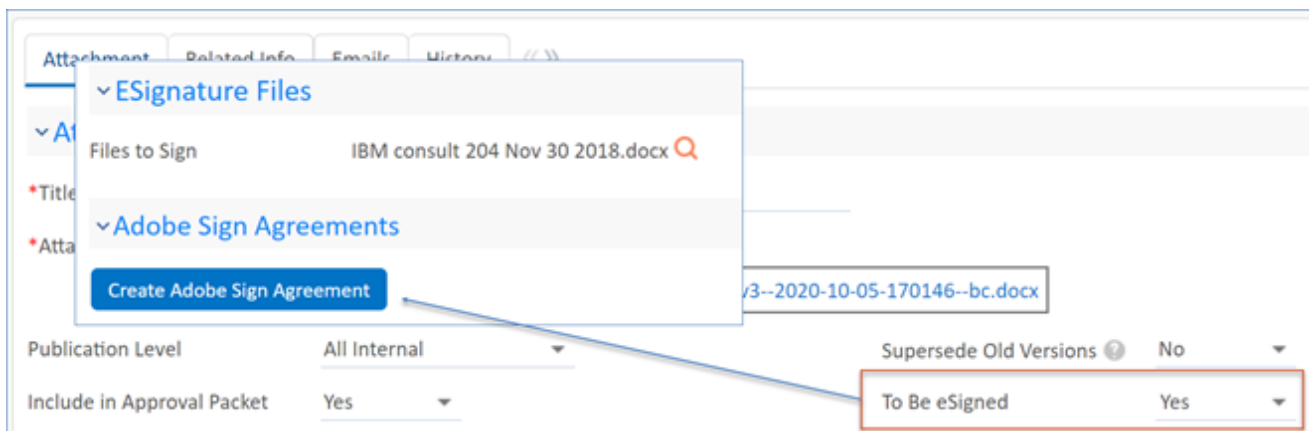


# Manage Documents with Adobe Sign

Document signing is typically integrated into a workflow between signing parties as part of the contract management process, as well as in some situations other than contract management. Using Adobe Sign with Agiloft allows you to send documents to different parties to sign and then track and manage those documents from within the system. The documents to be signed are either uploaded into a field in the relevant record, directly added in the Attachments table, or generated from print templates. For more information on using print templates with Adobe Sign, see [Create Document Templates with Adobe Sign Tags](#).

The signing process can be initiated directly from within a record, and you can select one or several documents to be sent for signing at once. The documents you can select are determined by the To Be eSigned field in the Attachment record for the document. An action button with a special Adobe Sign action in the record allows you to begin the signing process.



Adobe Sign is integrated with the Contracts table by default. If you want to integrate with other tables, you must complete a setup process. For more information on configuring Adobe Sign with your system and tables of your choice, see [Adobe Sign Integration](#).

## Useful to Know

- Adobe Sign uses the term "agreement," which is synonymous with "envelope" in older version of Agiloft. Adobe Sign documents are sent in the form of agreements, which can be purchased individually through an Agiloft knowledgebase or directly from Adobe if you have an Enterprise license.
- Adobe imposes a size limit per agreement. If the total file size of the agreement exceeds that, it fails on sending. For best results, limit your file size to 5 MB or less.

# Configure Signing Order and Signature Flow

Signing order and signature flow are two approaches for determining how Adobe processes the document for signing between recipients. Signing order allows you to determine the exact order that recipients receive the document to sign. Signature flow provides a more general approach for defining the recipient order and is only used in cases where the signing order hasn't been defined. We strongly recommend that you always use signing order because it is more reliable and offers more control over the recipient order. However, in both cases, the user can confirm the recipient order by previewing the agreement before sending it.

## Signing Order

To configure the default signing order for a document:

1. Click Setup [Table] and then click the Actions tab.
2. Edit the ext: Create Adobe Sign Agreement action. Adobe Sign must be integrated into the table for this action to appear. By default, Adobe Sign is integrated in the Contracts table. For information on integrating Adobe Sign into other tables, see [Adobe Sign Integration](#).
3. Click the Recipients tab.
4. Define the total number of recipients, as well as each recipient's signing order, role, field in the record that defines the signer, and optional message.

Adobe Sign Action

Recipients

<< >>

Number of Recipients

2

▼

Signing Order

1

Role

Signer

▼

Recipient Field


1st Party Signer Name

▼

Message

Adobe Sign recipients

The maximum number of recipients is 9, and recipients can have one [Adobe Sign](#) role. Delegate roles are available for Enterprise accounts, and in order to use them, you must log in to Adobe Sign as an administrator, go to Account > Account Settings > Send Settings > Allowed Recipient Roles, and select the "Allow senders to mark some recipients as delegators" checkbox. Delegates receive the document, and can review it, but they can't interact with it otherwise; instead, they must enter the email address for the person they are delegating to, and the document is sent to that address to complete the role's responsibilities. Delegates can't enter the email address for someone who is already a party to the current agreement.

 You can also set a recipient's signing order if you add a recipient when you create an agreement. For more information on creating agreements, see [Create Adobe Sign Agreements](#).

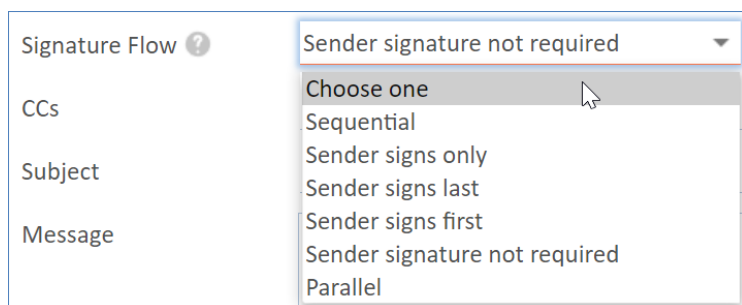
5. Click Save.

## Signature Flow

We strongly recommend that you always use signing order because it is more reliable and offers more control over the recipient order. However, if you need to use Signature Flow, use the steps below to configure the default signature flow for a document.

You can also set the signature flow when you create an agreement. For more information on creating agreements, see [Create Adobe Sign Agreements](#).

1. Click Setup [Table] and then click the Actions tab.
2. Edit the Create Adobe Sign Agreement action. Adobe Sign must be integrated into the table for this action to appear. By default, Adobe Sign is integrated in the Contracts table. For information on integrating Adobe Sign into other tables, see [Adobe Sign Integration](#).
3. On the Adobe Sign Action tab, use the Signature Flow field to choose a signature flow option. If a signing order has been defined, any choice here is ignored.

A screenshot of a web form showing a dropdown menu for 'Signature Flow'. The dropdown is open, displaying several options. The first option is 'Choose one', which is highlighted by a mouse cursor. Below it are 'Sequential', 'Sender signs only', 'Sender signs last', 'Sender signs first', 'Sender signature not required', and 'Parallel'. The 'Signature Flow' label has a question mark icon next to it. To the left of the dropdown are labels for 'CCs', 'Subject', and 'Message'.

Signature Flow options

These options are available:

- **Sequential:** Follows the signing order defined in the recipient list.
- **Sender signs only/last/first/not required:** Forces the sender to sign in a different order from the recipients. To use these options, you must add the sender as a recipient in the expected location.
- **Parallel:** Sends the document for signing simultaneously to both the sender and recipients.

4. Click Save.

# Create Adobe Sign Agreements

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Documents used with Adobe Sign are sent using agreements. An agreement acts as a container that holds the document, recipient information, signing order, and other processing details. You can create new agreements in the Adobe Sign Agreements table or, more typically, in another table where Adobe Sign has been integrated. For instance, the Contracts table in the out-of-the-box knowledgebase has a Signature tab with a Create Adobe Sign Agreement action button.

✓ In older KBs, you might see "envelope" used in place of "agreement." The functionality is the same.


To create an Adobe Sign agreement from a table with Adobe Sign integration:


1. Open a record and go to the Signature tab.
2. If the table has fields for selecting the documents to be signed and the recipients, populate them with the desired files and people. Select the documents in the order you want to show them, if possible.
3. Click Create Adobe Sign Agreement.
4. Edit or enter an email subject.
5. Optionally, add comma-separated email addresses to the Additional Email field to CC additional users. Any email addresses included in this way receive a copy of the document when the agreement is sent, as well as a copy of the completed document when all signatures have been received.
6. If you didn't define the documents and recipients in step 1, add them using the fields in the agreement.
  - Attach the documents in the order you want to present them to the recipients.
  - Recipients do not have to be added as an Adobe Sign user before they can sign agreements. In the Recipient record, enter their position in the signing order, full name, email address, and role. You can also use the Authentication Method field to use a single sign-on method, a password, or have no form of authentication, if you don't want to automatically authenticate users from within the document.
7. Choose a reminder frequency. This determines how often the recipient is reminded until they sign the document.
8. Set a deadline. After the deadline is reached, the agreement expires and the documents can no longer be signed.
9. Click Preview/Send to preview the agreement and make sure everything looks right before you send it.
10. In the Preview page, confirm the email addresses and signing order. Click and drag recipients to change the order, or click the address or signing position numeral to edit them. You can also use the toggle to switch between sequential signing and simultaneous signing.
11. Review the message that will be sent along with the documents, and make any necessary adjustments.
12. Review all the attached documents, and their order. You can drag and drop to change the order of documents, and you can upload additional files if necessary. However, files added here are not tracked in the Agiloft agreement record.

13. If desired, you can use the Options section to set a password, override the reminder frequency you set in step 7, or set another language for the recipients.
14. When everything is correct, click Send.

## Signing Process

The first recipient specified in the signing order or signature flow receives a notification by email that contains the document to be signed.


**Adobe Sign**

  
**MUTUAL NONDISCLOSURE AGREEMENT**  
This Mutual Nondisclosure Agreement (this "Agreement") is made as of this day of (blank), by and between Agiloft Inc., located at 460 Newport Court, Suite 200, Redwood City, CA 94063 and (second party), collectively referred to herein as "Parties" and individually as "Party."  
**WHEREAS**, the Parties have expressed an interest in engaging in a potential transaction (the "Transaction"); and  
**WHEREAS**, each Party may share certain confidential information with the other Party and the other Party may receive such information. The Party disclosing such information shall be a "Discloser" and the party receiving such information shall be a "Recipient".  
**NOW, THEREFORE**, in consideration of the mutual covenants contained herein and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties below agree on the following terms:  
1. In connection with the Transaction, each Party intends to disclose to the other Party certain non-public information related to its respective operations and financial condition, past present and future, which may include but is not limited to certain internal operating data, marketing plans, business plans and projections, financial information, scientific and proprietary information, research, development, patents and applications thereof, technical information, computer programs, know-how, trade secrets, knowledge, designs, specifications, concepts, data, reports, methods, processes, documentation, methodologies, pricing, acquisition plans, customer lists, salaries, business affairs, suppliers, profits, markets, sales strategies, unique servicing techniques, and any other information disclosed or submitted, orally, in writing, or by any other media, whether or not such information is marked or identified as "Confidential" (collectively, "Confidential Information"). The Confidential Information shall be used solely for the purpose of evaluating any proposed transaction involving the Parties and will not be used by the Recipient in any way detrimental to the Discloser. Nothing in this Agreement shall be construed as a requirement for either Party to disclose any Confidential Information to the other Party.  
2. Except as otherwise provided herein, Recipient may not disclose or permit the disclosure of the Confidential Information to any third party without Discloser's prior written consent. Recipient may only disclose the Confidential Information to its directors, officers and employees ("Representatives") who:  
(a) Need to know the information contained in the Confidential Information for the purpose of evaluating the Transaction; and  
(b) Are advised of this Agreement and agree to be bound by this Agreement to the same extent as if they were themselves parties to the Agreement.  
Recipient shall be responsible and liable for any breach of this Agreement by its Representatives to whom Confidential Information is disclosed.  
(18610400)

### Please sign Master Services Agreement

[Click here to review and sign Master Services Agreement.](#)

After you **sign Master Services Agreement**, all parties will receive a final PDF copy by email.

 has requested that this reminder be sent. This reminder will be re-sent every week until completed. [Click here](#) if you wish to stop receiving reminders about this agreement.

This document is available for **signing** until June 13, 2018 and will expire thereafter.

To ensure that you continue receiving our emails, please add [echosign@echosign.com](mailto:echosign@echosign.com) to your address book or safe list.

Adobe Sign automatically adds signature blocks to the document so that the recipient can insert their signature. Recipients do not need to have an Adobe Sign account to use their email address to sign the document. For more information, see [Sign a Document with Adobe Sign](#) on the Adobe website.

Recipients and senders are notified by email during the signing process. Recipients receive a second notification after they sign a document. The sender receives a notification when a document is sent for signing, when a recipient signs a document, and when all recipients have signed a document.

# Tracking the Signing Process

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To track the progress of a document and manage the audit trail, open the record in the Adobe Sign Agreements table and click the History tab. The statuses of the agreement workflow are updated automatically by Adobe and maintained in the Adobe Sign Statuses table. For more information, see [Adobe Sign Tables Overview](#).