

# E-signing

The e-signing functionality makes it quick and easy to get important documents signed by your team or customer.

## Send a document for e-signing by email

Navigate to the report you want to send for signing via the Reports drop-down in the main site navigation. **Click the send for signing button** outlined in red in the screenshot above. This will open the send for signing modal. You can edit the email as you'd like and then **click Send**. The recipient will receive the email which will include a link for them to review and sign the document.

The screenshot shows a document viewer interface. On the left, the document content is visible, featuring the title "Heat pump Proposal" and the address "81 Kings Hedges Rd, Cambridge, UK, CB4 2QD". On the right, a sidebar contains navigation and editing options. At the top of the sidebar, there is a back arrow, "Project Overview", and a download icon. Below this is the document title "Customer proposal". A section titled "Customise your customer proposal for a heat pump installation." is followed by an "Include Sections:" list with toggle icons for "Cover", "Contents", "Your system", "Heat pumps explained", "Sound check", "Quote", "Appendix - Heating Check", "Appendix - Materials", and "Appendix - Hot Water Calculations". At the bottom of the sidebar, a red box highlights a "0/1 Customer Signatures" field with a plus icon and a right arrow. Below the sidebar is a "Save" button.

## Signing a document

When viewing a document that requires e-signing, the customer (or your team members) can **click the signature field** and then enter their name, the date, and their signature. They must tick the box to indicate they agree to the contents of the document.

**Signature**

name  date

Clear

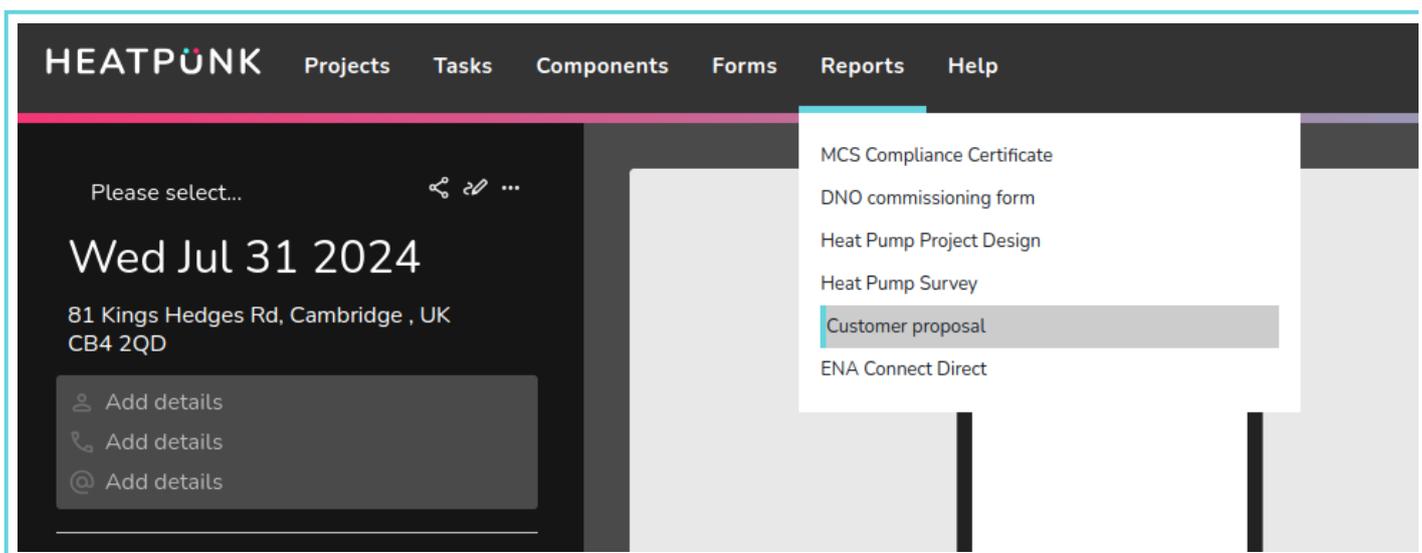
I agree to the use of electronic signatures to authorise this document.

Cancel Submit

After the document is signed after being sent via email, the recipient will receive an email with the signed document attached and you will receive an email confirming that the recipient has signed the document.

## View a signed document

To view the signed version of the document, **navigate to the document via the reports drop-down** in the main navigation. The signed version of the document can be loaded by selecting the version you want to view.



Revision #1

Created 13 November 2024 12:56:06 by Harry Doyle

Updated 13 November 2024 16:20:41 by Harry Doyle