

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

The screenshot shows a web interface for a 'Heat pump Proposal'. On the left, the title 'Heat pump Proposal' is displayed above the address '81 Kings Hedges Rd, Cambridge, UK, CB4 2QD'. A large grey rectangular area in the center represents the document content. On the right, a sidebar contains a navigation menu with a back arrow, 'Project Overview', and a download icon. Below this is the title 'Customer proposal' and a description: 'Customise your customer proposal for a heat pump installation.' A section titled 'Include Sections:' lists various components of the proposal, each with an eye icon to its right: 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 rectangular box highlights a button labeled '0/1 Customer Signatures' with a document icon and a right-pointing arrow. Below this box is a blue 'Save' button with a floppy disk icon.

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. Your customers email will autopopulate (provided you have included this in your project) and you will automatically be Cc'd. 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.

Send Email

To

installs@midstallations.co.uk

+ Bcc

Cc

harry.doyle@midsummerenergy.co.uk

Subject

Signing

Please follow [this link](#) to e-sign your document.

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☷

Cancel

Send

Signing

Use the attachment tool to send any documents.

📎 Add attachments

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

Daisy Kernick

date

06/08/2024



Clear

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

Cancel

Submit

After the document is signed via the link, 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. If you expect to see the signed document but cannot see a signature, check the right hand menu for a message saying there are multiple versions of this document and ensure you are viewing the signed document.

HEATPUNK

ProjectsTasksComponentsFormsReportsHelp

Please select...

Wed Jul 31 2024

81 Kings Hedges Rd, Cambridge , UK
CB4 2QD

Add details

Add details

Add details

MCS Compliance Certificate

DNO commissioning form

Heat Pump Project Design

Heat Pump Survey

Customer proposal

ENA Connect Direct

Revision #2

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

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