

Add Automated e-Signatures to Templates

Module 19 - e-Signatures

Version 1.0

Table of Contents

1.	Automated e-Signatures.....	2
1.1	What are Automated e-Signatures?	2
1.2	When to use e-Signatures.....	2
2.	e-Signature Settings	2
3.	e-Signature Email Templates for Sending.....	2
4.	Set-Up the Form.....	3
5.	Set-Up the Template.....	3
5.1	e-Signature Fields.....	3
5.2	Inserting e-Signature Fields into the Word Template.....	4
6.	Template Example.....	6

1. Automated e-Signatures

1.1 What are Automated e-Signatures?

Automated e-Signatures are fields that are inserted into templates so that the generated document is produced with the required mark-ups and ready to send for e-signing.

The Smarter Drafter e-Signature tool can be used in 2 ways:

- Set up a template with e-Signature fields, prepared with mark-ups for e-signing
- Manually mark-up a generated document OR an uploaded external document

These instructions are for setting up a template with e-Signature fields.

When creating a template for a document where e-signing is permitted, it's recommended that the template is set up with e-Signature fields so that this functionality is readily available, even if rarely used. The insertion of the fields in the template is a very quick process compared to having to manually mark-up a document later.

NOTE: Sending the generated document for e-Signature is not mandatory and nothing is different in the document that is generated – it is simply that the e-Signature functionality is ready if required.

1.2 When to use e-Signatures

It is recommended that e-signing is applied in templates where e-signing is permitted. When a document has been prepared with e-Signatures, Smarter Drafter won't force you to push the document through the e-signing process. The generated document will appear no different to a standard document and can be processed for signature digitally or in any other preferred method.

2. e-Signature Settings

e-Signatures need to be enabled on your Smarter Drafter account. If you can't see the e-Signature tools, contact your account administrator.

3. e-Signature Email Templates for Sending

Smarter Drafter uses standard email templates for the various notification and progress update emails required during the e-signing process. These templates cannot be altered or customised.

4. Set-Up the Form

Forms need to identify who a potential signee could be so that the e-Signature tool can connect to the relevant people/entities in the form. The only requirement here is to apply contact mapping or user mapping on the sections for all potential signees and ensure you have specifically mapped the name/company name fields.

Applying mapping won't force you to use e-Signatures, it will just allow them to be used if required. Otherwise, without applying mapping you won't see the e-Signature options when tagging the template.

NOTE: [See the Apply Contact Mapping guide.](#)
[See the Apply User Mapping guide.](#)

5. Set-Up the Template

5.1 e-Signature Fields

No specific fields need to be created for the e-Signature details. These fields will already be available in the Word Addin for all mapped contacts/users.

The e-Signature fields/components available are:

- **Signature:** Allows the signee to upload a digital file or select one of the default options
- **Name:** Automatically inserts the full name of the signee
- **Initials:** Allows the signee to upload a digital file or select one of the default options
- **Date:** Automatically inserts the date of e-signing
- **Capacity:** Role when signing for a company
- **Checkbox:** Allows the signee to tick a checkbox, e.g. to indicate their acknowledgement

You will be able to select the specific component required when you are inserting the fields using the Word Addin.

5.2 Inserting e-Signature Fields into the Word Template

e-Signature fields will be available in the Smarter Drafter Word Addin for all mapped contacts/users.

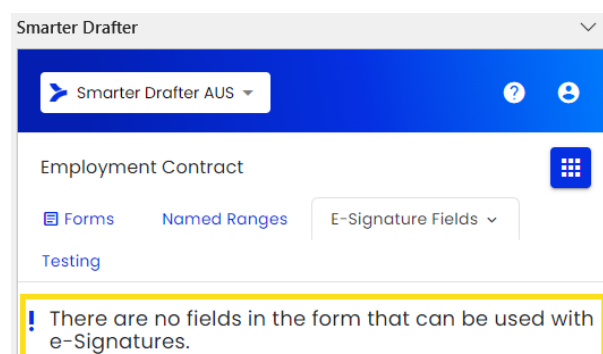
1. Go to **More**
2. Click on **e-Signature Fields**.



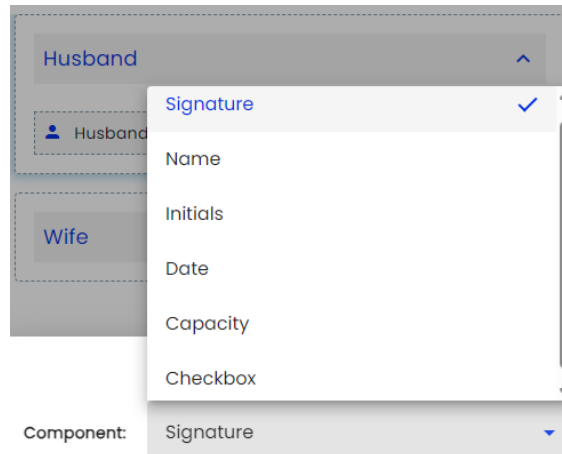
3. The available contacts/users who can be signatories will be listed.



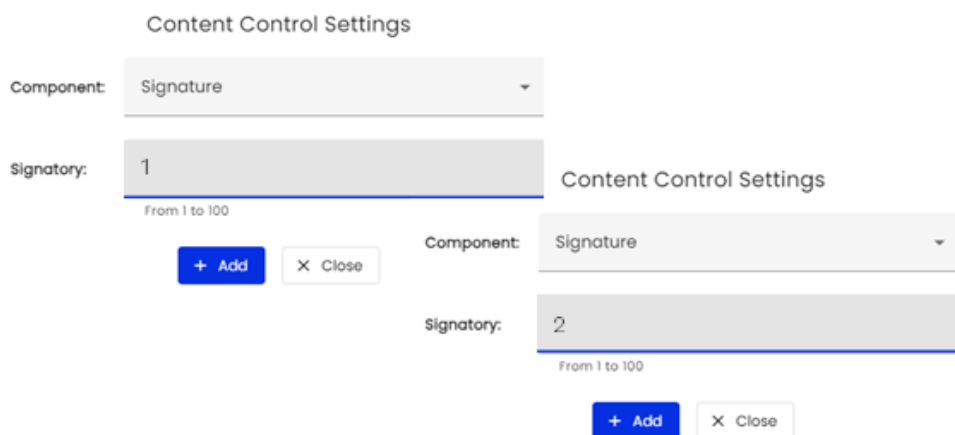
If you see the following error, you need to check your mapping settings.



4. Select the signatory and click the kebab on the right side of the name field. For individuals, select the component and click add to insert the field into your template. Repeat this for all e-Signature related fields required throughout the document, e.g. signatures or initials at the bottom of each page, final execution clause etc.



5. For companies, you will need to select the component and the specific signatory (if you have allowed for multiple signatories).



6. Template Examples

e-Signature fields appear as light green content controls in the Word template.

Image sizes are determined by the spacing and formatting, e.g. the size limit and spacing of a line or the size of a table cell.

Husband & Wife signatures¶

Full-Name¶	Capacity¶	Signature¶
• <input type="text"/>	Husband¶	<input type="text"/>
<input type="text"/>	Wife¶	<input type="text"/>

Company Signatory #1¶	Company signatory #2¶
Signature: → <input type="text"/>	Signature: → <input type="text"/>
Name: → <input type="text"/>	Name: → <input type="text"/>
Initials: → <input type="text"/>	Initials: → <input type="text"/>
Date: → <input type="text"/>	Date: → <input type="text"/>
Capacity: → <input type="text"/>	Capacity: → <input type="text"/>
Checkbox: → <input type="checkbox"/>	Checkbox: → <input type="checkbox"/>