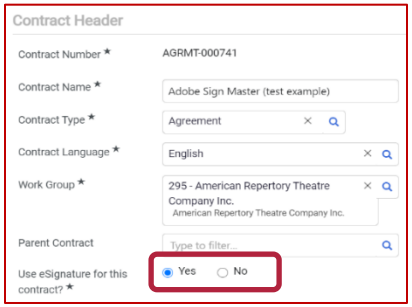
# eSignature

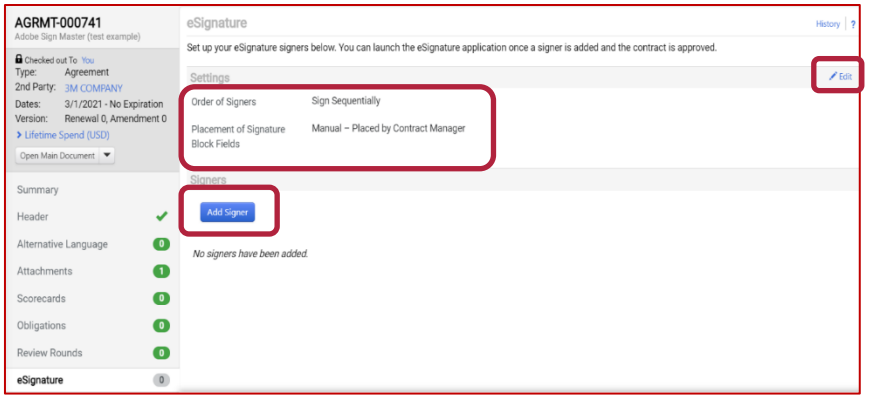
The Buy-to-Pay (B2P) contract management tool eSignature feature reduces the time and effort needed to obtain one or more signatures via Adobe Sign (enterprise account, no additional cost) or DocuSign (you must have and pay for your own DocuSign account). This feature is available to Contract Managers.

1. When entering your contract, set **Use eSignature for this contract?** to **Yes** and set **Entered After Fully Signed** field further down in the Header to **No**.

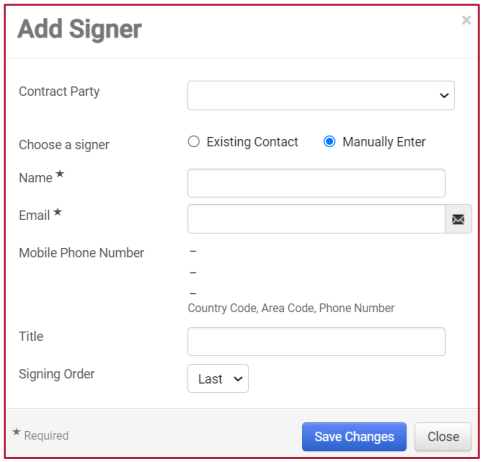




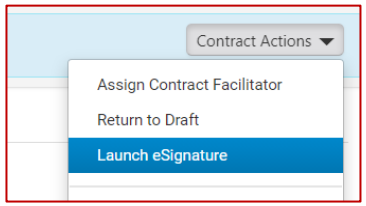
2. Before submitting your contract; in the **eSignature** section of the contract record, enter the signers. Click **Edit** if you want to change **Order of Signers** (sequential is recommended, send to the Second Party signer first) and/or **Placement of Signature Block Fields** (if you're not using a configured eSignature template, placement will need to be manual). Click **Add Signer** for each signer.




3. When adding a signer, select the **Contract Party** that person will be signing on behalf of. **Choose a Contact** for the party; if the appropriate contact doesn't appear, select **Manually Enter Signer** and enter that person's **Name** and **Email**. All other fields are optional. Click **Save Changes**.




4. When you've entered all required information and have uploaded your executable **Main Document**, **Submit** your contract. When the contract status changes to **Pending Signature**, under **Contract Actions**, click **Launch eSignature**. After submitting, it may take a minute or two for the status to change from Pending Approval to Pending Signature. When viewing the contract record, you can refresh your browser to see if the status has changed yet.




5. Launch eSignature will take you to the eSignature tool (Adobe Sign or DocuSign).

The screen shots and instructions on the next page are based on use of Adobe Sign and manual placement of signature block fields.

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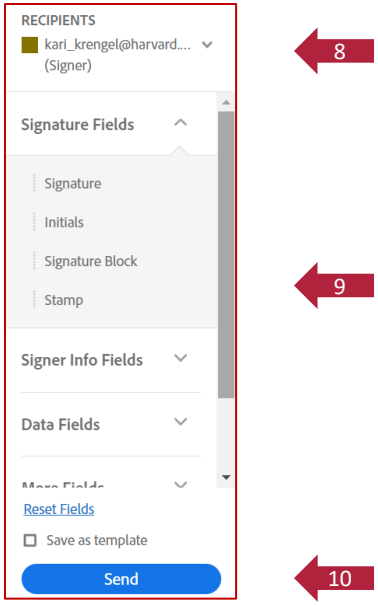
6. From the tagging and send landing page, scroll down to the signature blocks. While tagging of signature blocks is the most common use case, you're not limited; you can add tags anywhere in the document.


7. Use the tagging and send menu (on the right-side for Adobe Sign, on the left-side for DocuSign) to place tags for each signer (recipient) and send the document for electronic signatures.

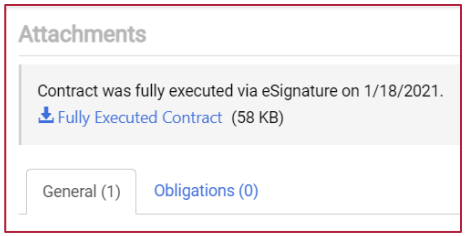



8. At the top of the menu, select the signer you want to add tags for by clicking on the down arrow and then clicking on the signer. Only select signers that you added to the contract record in B2P. Repeat this step and the next step for each signer.

9. In the middle of the menu, click and drag each field needed to the appropriate location on the document to create a tag that the signer will be prompted to enter (e.g., Signature, Name, Title). Note there are several sections of available fields (e.g,. Signature Fields, Signer Info Fields, Data Fields). Scroll down to see all sections and click on the down arrow to open a section to see the list of fields. **Do not check the Save as template box.**

10. When all tagging has been completed for all signers, click Send. You will then see a message that the document has been sent for signature. **Close your browser** to exit the eSignature tool.

11. When all signers have completed signing, the signed document will automatically be uploaded to the contract record under Attachments.




The following emails are sent during the eSignature process from:

- B2P to the Contract Manager when the contract status is set to Pending Signature or if a signer declines to sign.
- The eSignature tool to signer(s):
  - Requesting their signature.
  - Daily reminder until they have signed.
  - To provide a copy of the fully signed document.
  - If a signer declines to sign.

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- To monitor and manage your contracts that are awaiting signature, use **Search Contracts – Advanced Search.** Search for your contracts using the **Contract Status** and **Contract Manager** filters.


On the contract record, the **Status and Tracking** within **eSignature** will show the status for each signer (e.g., Created, Sent, Completed).

- If sent to the wrong signer, signers have the option to delegate or decline. If a signer declines, you will receive an email; but the contract status will remain Out for Signature and the Status and Tracking will indicate the request was Sent.

  If you need to make a change to any eSignature Settings or Signers after you have sent for eSignature, under **Contract Actions**:

  1. Select **Reset eSignature Process**
  2. Select **Withdraw and Return to Draft**
  3. Select **Check Out**
  4. Make changes Settings and/or Signers under **eSignature**
  5. Select **Check In**
  6. **Submit**
  7. Select **Launch eSignature**