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.

 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.

Contract Header				
Contract Number *	AGRMT-000741		Miscellaneous Inform	ation
Contract Name *	Adobe Sign Master (test example)		Entered After Fully	
Contract Type *	Agreement × Q		Signed (No
Contract Language *	English	×q	Acting By and Through	
Work Group *	295 - American Repertory Theatre Company Inc. American Repertory Theatre Company Inc.	×Q		2000 characters remaining
Parent Contract	Type to filter	٩		5
Use eSignature for this contract? *	● Yes 🔵 No			

 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.

eSignature		
Obligations Review Rounds		
Scorecards	0	
Attachments	10 signers have been audeu.	
Alternative Language	No signers have been added.	
Header	Add Signer	
Summary	Signers	
Open Main Document		
 Lifetime Spend (USD) 	Placement of Signature Manual – Placed by Contract Manager Block Fields	
Dates: 3/1/2021 - No Exp Version: Renewal 0, Amend		
Type: Agreement 2nd Party: <u>3M COMPANY</u>	Settings	🖌 Edit
Checked out To You	Set up your eSignature signers below. You can launch the eSignature application once a signer is added and	d the contract is approved.
AGRMT-000741 Adobe Sign Master (test example)	eSignature	History

 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.

Contract Party	~
Choose a signer	O Existing Contact
Name *	
Email *	
Mobile Phone Number	– – – Country Code, Area Code, Phone Number
Title	
Signing Order	Last 🗸

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.

Contract Actions 🔻	
Assign Contract Facilitator Return to Draft	
Launch eSignature	

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.

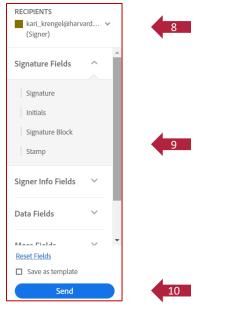


eSignature

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.

POWERED BY Adobe Sign		
leports		
	Relative to Page	Navigate to 🗸
HARVAF	RD.	SERVICE PROVIDER

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.

Attachments	
Contract was fully executed via eSignature on 1/18/2021. Fully Executed Contract (58 KB)	
General (1)	Obligations (0)

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.



eSignature

 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.

Contract Status	Pending Approval × Q
	Pending Signature \times
	Out for Signature $ imes$
Contract Version Type	· ·
Contract Manager	🔿 Any 🚺 Me 🔿 Pick

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

