

Authentisign Basics

Creating a Signing

Step 1: Open the Document

- Open the completed form that needs signatures.
- Review the document for accuracy before sending.

Step 2: Start a Signing

- Click **Signings** (right hand side)

Step 3: Add Signers

Select the individuals who need to sign the document.

You can add:

- New Signer
 - Signer from contacts
 - Signer from transaction
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Signer Types

Remote Signer

Use for anyone who will receive the document electronically and sign on their own device.

Examples:

- Buyers
- Sellers
- Cooperating Agents
- Lenders (if applicable)

The signer receives an email with a secure link to review and sign.

Reviewer

Needs to review the docs before they are finalized but doesn't necessarily need to sign. (ex. broker or compliance)

CC

Will get a copy of all fully signed and/or approved docs

(Use when someone only needs a copy of the document and does not need to sign ex. listing agent on offer)

Examples:

- Lender
- Title Company
- Transaction Coordinator
- Listing agent

These recipients can view the completed document but cannot sign.

Signing Yourself While Preparing Documents

If you need to sign while preparing the document:

1. Under Tools (right hand side)
 2. Select "yourself" on drop down menu
 3. Place signatures/initials where needed
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Placing Signature Fields

After assigning signers:

- Place Signature fields where signatures are required.
- Place Initial fields where initials are required.
- Place Date fields when dates are needed.
- Verify each field is assigned to the correct signer.
- Some forms may auto populate signing fields. Review & delete/move as needed.

Always review field placement before sending.

Sending the Signing

Before sending:

- ✓ Verify all pages are included.
- ✓ Verify all required signatures and initials are assigned.

✓ Verify signer email addresses are correct.

✓ Review the signing order if multiple signers are involved.

Once verified, click **Send**.

Authentisign will automatically email the document to the designated signer(s).