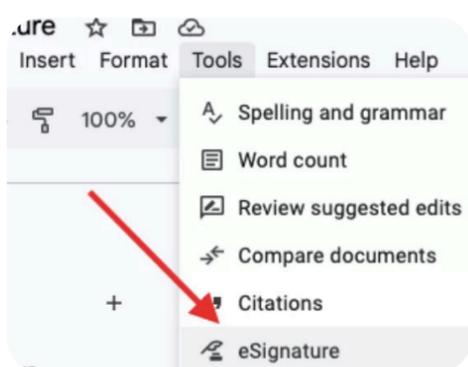




# GOOGLE E-SIGNATURE

Step-by-Step Guide for one of Client Cloudcare's Favorite Tools for Thrifty Nonprofits

## STEP 1



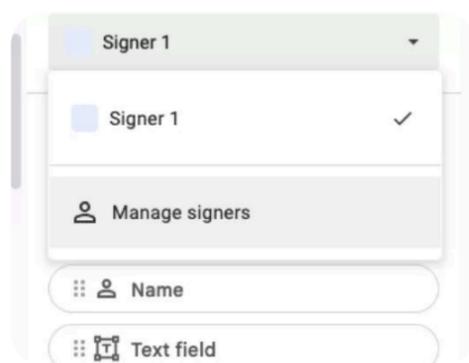
### Navigate to eSignature

At the top of the Google doc, navigate to: Tools > eSignature

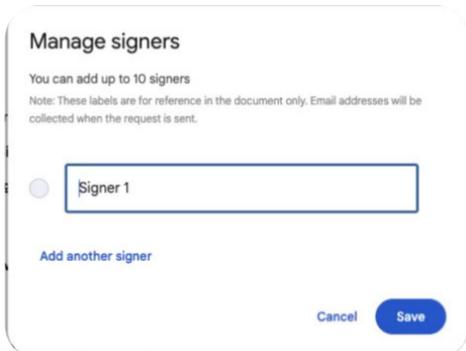
## STEP 2

### Manage Signers

Under the "Insert Fields For", update the list of signers in the dropdown. Select Manage signers to open the "Manage signers" dialog.



## STEP 3



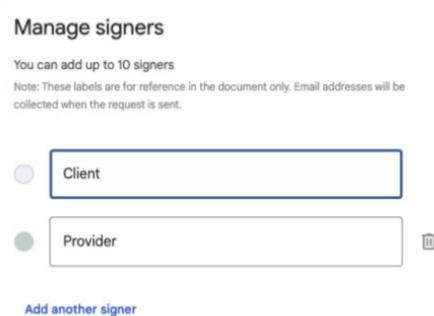
### Add Signers

In the dialog box that pops up, you can add up to 10 signers and assign labels.

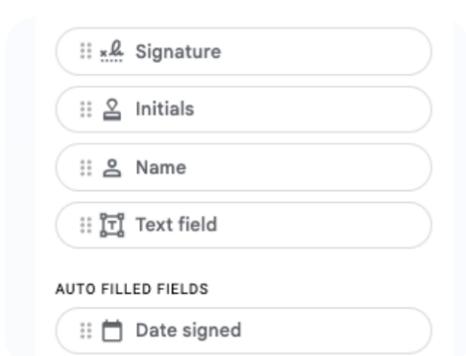
## STEP 4

### Customize Labels

These labels are for reference in the doc only. Emails are collected when you send the request for signatures.



## STEP 5

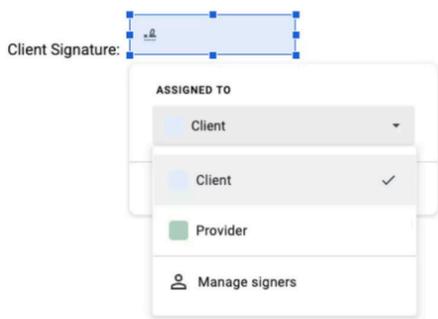


### Add Fields

Drag one or more of the following to your document:

- Signature
- Initials
- Name
- Text field
- Date Signed

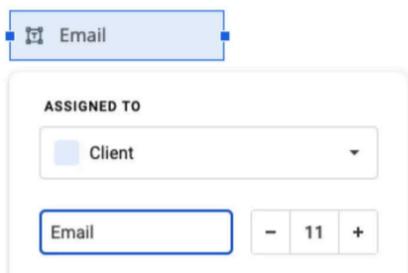
## STEP 6



### Assign Fields to Signer

Click the field box. You will see a drop down menu, which allows you to change who the field is assigned to.

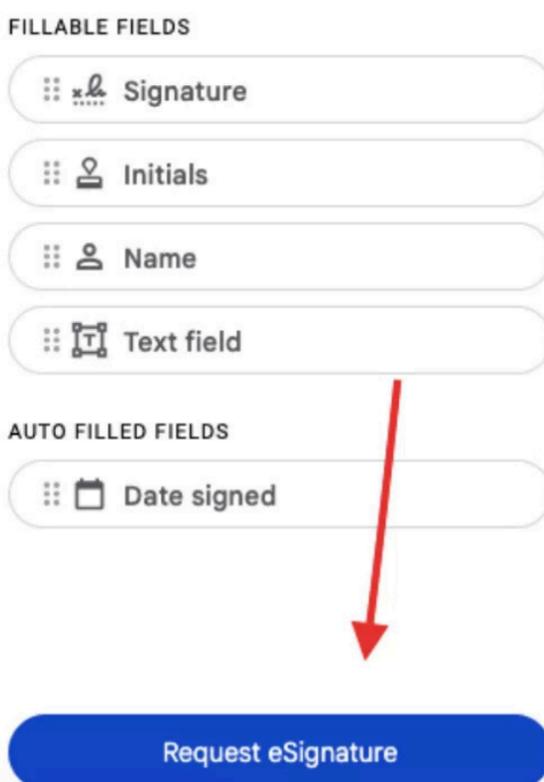
## STEP 7



### Customize Fields

When you select a "Text Field," you can add a placeholder to inform what you expect in the field, like "Job title" or "Email".

## STEP 8



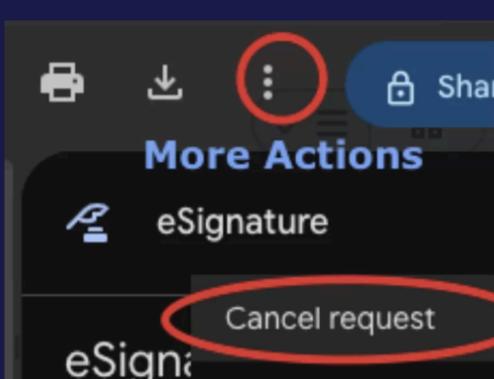
### Request eSignatures

After you add any fields you need, on the right, click Request signature.

- Enter a title for the PDF
- Enter an email address for each signer.
- Add a message that will be included in the eSignature request email.
- Review and accept Terms of Service
- Click Request eSignature

## WHAT'S NEXT?

- A PDF file is generated and shared with the signers with view access. It is also saved in your My Drive.
- An email notification is sent to the signers with a link to the document.



### TO CANCEL A ESIGNATURE REQUEST:

1. Open the PDF file for that signature request.
2. Click Menu > Cancel request.

**To View the Status:** Open the PDF file for that request. Click Menu eSignature > Click "View details". On the side panel, you'll find the details of the request and its status.