

# **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.

ſ.	Signer 1	-
	Signer 1	~
	A Manage signers	
	태 음 Name	
	# ]표] Text field	

# STEP 3

Mar	nage signer	s
You ca Note: Ti collecte	an add up to 10 sign hese labels are for refe ed when the request is	vers arence in the document only. Email addresses will be sent.
	Signer 1	
Add	another signer	
		Cancel Save

#### **Add Signers**

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



#### **Customize Labels**

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

#### Manage signers

#### You can add up to 10 signers

Note: These labels are for reference in the document only. Email addresses will be collected when the request is sent.

Client	
Provider	

#### **STEP 5**

። «ደ Signature	
Initials	
태 음 Name	
::: [고] Text field	
AUTO FILLED FIELDS	
🔢 🛅 Date signed	

#### **Add Fields**

Drag one or more of the following to your document:

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

# STEP 6

Client Signature:	<u>.e</u>	
	ASSIGNED TO	
	Client	*
	Client	~
	Provider	P
	A Manage signers	
	Amage signers	

#### 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

ASSIGNED TO		
Client		•
Fmail	 11	+

# **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

# FILLABLE FIELDS

#### 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

**Request eSignature** 

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.