

Smart Tags Guide

What Are Smart Tags

Secured Signing MS Word and PDF File integration is making the document Secured Signing ready at the document creation stage is the Smart Tags function.

Smart Tags are a way of telling Secured Signing who should sign a document and where their signature should be placed in the document. Using Smart Tags takes away the need to manually position a signature block in your document. This makes it even quicker and easier to upload a batch of documents and invite people to sign them with just a few clicks.

Smart Tags can also be used to add fields in your document that are to be filled in before the document is signed.

Smart Tag Syntax

A Smart Tag is just a piece of text in your document in the following format.

[!Sign.1.F.Notify.SMS,First Name,Last Name,Email,+61,0412345678]

The Smart Tag allows you to set the following options.

- 1** The signing order. Use 1 for all Smart Tags for a non-sequential signing process. If setting a sequential signing order, all tags for the same person must have the same number.
- F** Use the person's full signature
- I** Use the person's initials
- Notify** Send an email notification after the person has signed.
- SMS** Requires the signer to enter a code sent to the mobile phone number provided to be able to sign the document

All items after the comma reflect the details of the person who will be asked to sign the document at this point. If the details are left blank, you will be prompted to provide the signer's details when the document is added to Secured Signing.

A Smart Tag to invite James Bond to sign a document would be:

[!Sign.1,James,Bond,007@hmss.gov.uk]

Smart Tags to invite James to sign a document first and then have Ms Moneypenny sign the document would be:

[!Sign.1,James,Bond,007@hmss.gov.uk]

[!Sign.2,Ms,Moneypenny,mmoneypenny@hmss.gov.uk]

A dynamic Smart Tag that prompts for the signer's details each time the document is added to Secured Signing would be:

[!Sign.1,,,]

Smart Tag Form Fields

You can also use Smart Tags to add both text fields and checkboxes to your document. The person invited to sign the document can fill in these fields and check the boxes before signing. If you make a field mandatory, it must be completed before the person will be able to sign.

Just like a Signature Smart Tag, the Field Smart Tag is just a piece of text in your document in the following format.

[!Field.Text.R.Width.Height]
[!Field.Text.R.120.20]

Text Defines the field as a Text Box

Setting the field type is mandatory. All other values are optional

R Required (makes the field completion mandatory before signing)
O Optional
Width Width of text box (can be any value, 120 is default),
Height Height of text box (can be any value, 20 is default)
Dimensions are in pixels

[!Field.Checkbox] – adds a check box

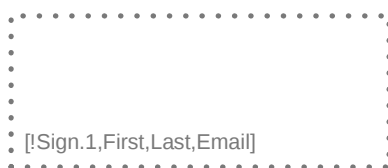
Checkbox Defines the field as a Checkbox

Designing Your Smart Tag Document

When you upload your Smart Tag document to Secured Signing, all tags will be replaced with a default signature block. This will show the person's graphical signature, their name and the date and time they sign the document.

The default signature block is approximately 120 pixels by 60 pixels. The bottom left of the signature block will be placed where your smart tags starts. Make sure you allow enough white space in your document above the Smart Tag for this to occur.

The following represents how the signature block will be placed relative to the Smart Tag



[!Sign.1,First,Last,Email]

Questions

Smart Tags are a great automation tool that will make it even quicker and easier to get your documents signed. So give it a go!

We also have demonstration videos for using Smart Tags. You can view them at:
<http://www.securedsigning.com/support/demo-videos/>

If you have any questions please don't hesitate to get in touch.
support@securedsigning.com