



for Salesforce

Cheat Sheet

The logo consists of a red circle with a white 'R' inside. To the right of the circle is the word 'Sign' in a black, cursive script font. A registered trademark symbol (®) is located to the upper right of 'Sign'.

Sidebar


OPTIONS

Date Format

US


Expires in

30 Days


Send Reminder in

0

Days



Then Send Reminder every

0

Days(3 Max)



Send final reminder before expiration

0

Days



Access Authentication

Select


Enter Access Code or Leave Blank


☐ Email Access Code

Send Individual Signature Notifications



Y

Include Signature Certificate in the signed PDF



Y

Option	Description
Date Format	Select the date format that should apply to date controls added to the document (Date / Date & Time) and the Signature Certificate
Expires in	Set the amount of time that the document will be available for Signers
Send Reminder in	Establishes the date of the first reminder email to be sent to signers. They won't be sent if the document has been signed or has expired
Then Send Reminder every	Recurrent reminders to be sent after the first one. Emails won't be sent if the document has been signed or has expired
Send final reminder before expiration	The last reminder you want Signers to get. Emails won't be sent if the document has been signed or has expired
Access Authentication Protect private or confidential information and/or to ensure the document is only signed by the correct signer	End-to-End: Will require an access code for the intended signer to view and sign the Rsign® document securely and also subsequently after the document has been signed, for anyone else to view the final signed document. Required To Open Signed: This option only requires an access code to view the final signed encrypted document once it has been signed.
Send Individual Signature Notifications	When a user sends out an Rsign® document to be signed by multiple signers, the sender will receive a notification email each time a signer signs the document
Include Signature Certificate in the signed PDF	Includes the audit trail of the document delivery, signatures and more on the last page of the signed document(s). Else it will be received separately.

Roles


RECIPIENTS
Add Recipients

Order	Type	Recipient Type	Name	Email	Action
1	Signer	Select Recipient Type	Add Recipient Name	Add Email	
2	Signer	Select Recipient Type	Ariel Schapiro	ashapiro@rpost.com	
0	CC	Select Recipient Type	Add Recipient Name	Add Email	
0	Prefill	Select Recipient Type	Ariel Schapiro	ashapiro@rpost.com	

☒ Sign in Sequence

You can select different roles for each stakeholder you want to send the document to. The roles you can select for recipients are:

- **Signer:** Every recipient under this role will be notified and requested to sign the document. You can specify a sequence and RSign® will block signers from signing before it's their turn
- **CC:** People who won't sign the document(s) but will get a copy
- **Prefill:** You can sign or fill out portions of a contract before sending it by using this role.

Documents

 DOCUMENTS

Order	Name	Action
Add at least one document.		

Add Documents
 Add Documents
 Attachments
 Desktop Attachments

When choosing a document for signature, you can add it from an existing attachment under the Salesforce record or from your desktop. Also, if you select a Salesforce or RSign® template, any attachments will be automatically added. You can add controls to the documents in the next step.

✕ 📄 🔄 🔄 ☰ ☰ ☰ ➕ Add Dependencies 🔄 Clear 🗑 Discard 🔍 View PDF ➤ Send

Signer 2:
 Name
 Company
 Signature

Name
 Company
 Signature

Signature

Date & Time Stamp

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Compose

Composing an email is as simple as any other email service but with perks.

In order to fully integrate with your Salesforce CRM system, RSign® will let you choose Leads, Contacts and Users to include in the Signer and Cc roles.

You can also save time by using any Salesforce email template or RSign® Template available instead of writing the email.

 ADD MESSAGE

☒ Salesforce Template ☐ RSign Template

Salesforce Template

Select Salesforce Template

* Subject

Subject

* Message

B *I* U       **A** **Tt** **H**         

  