

Keyhouse Computing Ltd. IMI Business Campus, Sandyford Road, Dublin 16. Call +353 1 2902222 Email info@keyhouse.ie

DocuSign with Keyhouse

Web:www.keyhouse.ieKeyhouse Support:support@keyhouse.assist.com



Keyhouse Computing Ltd. IMI Business Campus, Sandyford Road, Dublin 16.

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Use DocuSign

Overview

Traditionally documents were signed using a 'wet' signature and in some cases, a wet signature must still be used. However, the majority of documents can be signed by electronic means. To facilitate this, the option to use DocuSign has been added to Keyhouse.

NOTE: This feature must be activated by the System Administration in conjunction with Keyhouse Support.

Adding Signatures to a Document

- 1. Click to the Document Manager and right click on the document or documents to be signed.
- 2. Select 'Request selected document(s) for signing'.





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3. The following window opens. It can be resized for ease of use.

Action		^
Send Manage Add New Client Delete Sign Delete All Sign Document(s) Signer(s) Associate Contact field fields		
Select a signer Rank of Sutton	Letter of Authority to take up Deeds2807.pdf (1/1)	Select the document
Bank of Sutton		Letter of Authority to take up Deeds_2 Y
Z Signature	LETTER OF AUTHORITY	for the second s
15 Initial	Address: IMI Campus Sandyford Dublin 16	Page1
Company	The Manager, The Bank of Sutton	Pager
C Date Signed	23 High Street Suntan Co Dublin	
🗖 Date		
Ame Ame	RE: Property: 5 The Haywain, Sallins, Co Kildare Account No. 852366987	
🔤 Email	Dear Sirs, We, Brenda Hartley hereby inrevocably authorise the firm of Soo Grabbit & Runne, Solicitors to act on our behalf in respect of the sale of our house and we hereby authoriseSoo Grabbit & Runne to take up	
🖀 Title	our Title Deeds on Accountable Receipt for the purpose of the sale of the property.	
O Approve	SIGNED: Dated:	
O Decline		
	First Page Previous 1 Last Page	

- 4. The panel on the left lists the values that can be added to the document, while the panel on the right will show the documents selected and the pages of the current document. Clicking on the page will move the document to that page. Use the dropdown arrow beside the document name to change to the next document.
- 5. To add the headings to the document, select the client or associate name from the dropdown option.

1	Action										
	0		2.		Í						
	Send	Manage	Add	New Client	Delete	Sian D	elete All	Sian			
D	ocument(s)	Signer(s) A	Associate		fie		fields	-			
5	elect a signe	r									
	ank of Sutto	n					~				
ĺ	one of outlo										
ſ											
											г
	Code	Nam	e			Email		TYPE	Co	lour	L
•	904354	Bank	of Sutto	n				Lending Inst	iit Co	lour	
	JOEBOL	Blogg	js & Asso	ociates		info@b	loggs.ei	Solicitors	Co	lour	
	HAR001	Brend	ia Hartle	у				Client	Co		
	HAR001	Brend	la Hartle	у		bhartle	/@key	Client	Co	lour	
	DU0002	Dubli	n City Co	ouncil		dubcor	p@iol.ie	Local Autho	rity Co		
	GRA004	Grace	e & Asso	ciates		info@g	race.ei	Auctioneers	Co		
	JOEBOL	Jame	s King			jking@l	bloggs	Solicitors	Co	lour	
					jsmith@fcc.ie			Engineers	Co	lour	ſ
	SMI003	John	Smith			Jannune	PICCIE	engineers			1
	SMI003 MEL001		Smith Mellon				n@gm	Vendor		lour	



How To Guide

- 6. The name in the dropdown box will change to the selected name.
- 7. Drag and drop the field required for each signer and position them on the page.

	LETTEI	R OF AUTHORITY	
		Address:	IMI Campus Sandyford Dublin 16
The Ma Bank of 23 High Sutton Co. Dul	Sutton Street		
RE:	Property: 5 The Haywain, Sallin Account No. 85236987	s, Co Kilare	
Dear Si	78,		
Solicito	nda Hartley and Jiby Jacob hereby in s to act on our behalf in respect of th take up our Title Deeds on Accoun	he sale of our house and w	e hereby authoriseSoo Gra
SIGNE	bhartley@keyhouse.ie	Date:	bhartley@keyhouse.i
NAME	Brenda Hartley bhartley@keyhouse.ie		
SIGNE	D:	Date:	
NAME			
DOME:			

- 8. A different Colour is allocated to each signer.
- 9. If the required Signer is not in the list, they can be added using one of 3 options.



- Manage Signer(s) Will enable a signer to be added for this document onlyAdd Associate Will enable a new Associated to be added to the matter using Associates Screen
- New Client Contact Will enable a new Client Contact to be added to the Client using the Client Contact Screen
- 10. Once the name has been added, select from the drop-down list and drag into position.



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Send

Manage

Document(s) Signer(s) Associate Contact

Add

Send Socument(s	Manage Signer(s)	Add Associate	New Client Contact	Delete S field	-	lete All fields	Sign	
elect a sig							1	
ank of Sut	ton					~		
Code	Nai	ne		E E	Email		TYPE	Colour
Code 904354		<i>ne</i> k of Sutton			Email		TYPE Lending Instit	
	Ban				E <i>mail</i> nfo@bl	oggs.ei		
904354	Ban Blog	k of Sutton	ciates			oggs.ei	Lending Instit	. Colour
904354 JOEBOL	Ban Blog Brei	k of Sutton 395 & Asso	ciates	i	nfo@bl	oggs.ei @key	Lending Instit Solicitors	Colour
904354 JOEBOL HAR001	Ban Blog Brei Brei	k of Sutton ggs & Asso nda Hartley	ciates	ii k	nfo@bl ohartley		Lending Instit Solicitors Client	Colour Colour Colour Colour
 904354 JOEBOL HAR001 HAR001 	Ban Blog Brei Brei Dub	k of Sutton ggs & Asso nda Hartley nda Hartley	ciates , , uncil		nfo@bl ohartley	@key @iol.ie	Lending Instit Solicitors Client Client	Colour Colour Colour Colour
904354 JOEBOL HAR001 HAR001 DU0002	Ban Blog Brei Brei Dub Gra	k of Sutton ggs & Asso nda Hartley nda Hartley olin City Co	ciates , , uncil	ii E c	nfo@bl phartley dubcorp nfo@gr	@key @iol.ie	Lending Instit Solicitors Client Client Local Authority	Colour Colour Colour Colour Colour
 904354 904354 JOEBOL HAR001 HAR001 DU0002 GRA004 	Ban Blog Brei Brei Dub Gra Jam	k of Sutton ggs & Asso nda Hartley nda Hartley olin City Co ce & Assoc	ciates , , uncil	ii E c	nfo@bl phartley dubcorp nfo@gr	@key @iol.ie ace.ei	Lending Instit Solicitors Client Client Local Authority Auctioneers	Colour Colour Colour Colour Colour Colour Colour
904354 JOEBOL HAR001 HAR001 DU0002 GRA004 JOEBOL	Ban Blog Brei Brei Dub Gra Jam Jiby	k of Sutton ggs & Asso nda Hartley nda Hartley olin City Co ce & Assoc ues King	ciates , , uncil		nfo@bl phartley dubcorp nfo@gr	@key @iol.ie ace.ei loggs	Lending Instit. Solicitors Client Client Local Authority Auctioneers Solicitors	Colour Colour Colour Colour Colour Colour Colour

11. To remove a field from the page, click on the field and select 'Delete Sign field'. To remove all fields, select 'Delete All Sign fields'



13. The following dialog box appears. This will enable you to change the order of the signers, using the 'Move Up' and 'Move Down' options.

fields

New Client Delete Sign Delete All Sign

field



- 14. Click 'Send document' when ready.
- 15. An email will then be sent to the first signer and a message will appear to say the document has been sent.





16. An action will also be created on the Case Diary once the document has been sent.

	_											
Case	: H/	4R003	3/000	2	 ▶] .					Tel:	086-987	74563
						Sale of S	5 The Haywain,	Sallins, Co Kildare		F/e:	CN	
WARI	NIN	G : Pl	ease	corres	oond by Email					Ignore	Show	/ me
[5	Searc	h		0				St	andard View	÷	
Action					Date 💌	Time	Handler	Synopsis	Team	Action Co		Preview
9		٢			08 Oct 2020	10:36	CN	Critical Date - Completion Date	COM	G23	P^	view
		А			10 Sep 2020	16:18	CN	Remind Client to return signed Authority	COM	PSL02	P	17
		🕰 10 Sep 2020 10:39 CN The below document(s) were sent for signing		The below document(s) were sent for signing by DocuSign - (Signing Status : sent)	сом	ADMAA	P					
		A			08 Sep 2020	16:20	CN	Remind Clients to provide AML Documentation	COM	ADMAA	P	

NOTE: This can also be done from the Case Diary Attachment section.

Cancel the Signing of a Document

If a document has been sent in error, it can be recalled.

- 1. Click the Refresh button to update the document. If the document has been signed, it will change to a PDF document and it cannot be cancelled.
- 2. Right click on the document and select Check Signing Document Status.





How To Guide

3. The Status Window will open.

Carol Nolan	2	2	ep 2020 1:5 sted Date	1:00 PM			ent rrent Status		
Download Signed Document		Reserved	end I Document				ancel ncel Signing		Û
Update Get Current Status		ATE							
Routing Order	Signer Name Brenda Hartley	Signer Ema			Status	•	Track Reference 7198	Document Contract for Sal	e

4. Cancel Signing and click Yes to confirm.

DocuSign	
2	Do you want to cancel the signing process? Yes No

- 5. Click the Refresh Button on the Document Manager.
- 6. Right click on the document again and select 'Check Document Signing Status'.



How To Guide

7. The Status window changes to show the request has been voided.



8. Click Download to update the document. A PDF version of the document will be added to the Document History with a Watermark stating VOID.



9. Click the Refresh button to update the Document Manager.



How To Guide

Review the Signing Status of a Document

- 1. Refresh the Document Manager by clicking on the Refresh button.
- 2. Right click on the document and select 'Check Signing Document Status'.



3. The Document Signing Status Window opens.



- **4.** The status will change depending on the number of signers and the stage of the document.
 - Sent The document has been sent to the signer. I will only move the next signer once it has been signed by the proceeding signer.
 - **Created** The document has been created to go to this signer once the proceeding one has signed the document
 - **Completed** The document has been signed by the signer



Declined	The signer has declined to send the document. In this case the document will not be sent to the next signer on the list.
Assigned	The signer has sent the document to another person to sign.

Download a Signed Document

Once the document has been signed by all Signers it must be download to the case and the action in the Case Diary completed. The document can be done from either the Case Diary or the Document Manager.

From the Case Diary

1. An Email is received confirming document has been signed.

Brenda Hartley	concontraction and a second mater	Thu 9/10/2020 10:39
problems with how this mess to download pictures. To help	rage is displayed, click here to view R in a web bosware. p protect your privacy, Outlook prevented automatic download of some pictures in this message.	
	E Rept-click or two	
	I mark Vice Vice Vice Vice Vice	
	Your document has been completed	
	Keyhouse admin@keyhouse.ie	
	All parties have completed Keyhouse, sent you a document to review and sign.	
	Do Not Share This Essail This email contains a secure link to DecuSign. Please do not share this email, link, or access code with others.	
	Attenants Signing Method Visit DocuSign con, disk: /cocoss Documents', and enter the security code: 0A7CI300093D408728F225CA04DD3E301	

2. Double click on the action in the Case Diary. **Note:** the action is a required action and cannot be deleted.

Ca	ase: HAR001/0001 Te Brenda Hartley Te Sale of 5 The Haywain, Sallins, Co Kildare F/c												el: /e: CN	
	Search 🖏 Standard View 🕈 🗍													
Acti						Date	•	Time	Handler	Team	Synopsis	Action Co		Pre
on		А				18 Dec 2020		16:32	CN	сом	Remind Lender to send Title	PSL04	P	view
		Qu.				18 Dec 2020		16:28	CN	сом	The below document(s) were sent for signing by DocuSign - (Signing Status : completed)	ADMSG	P	
	9	A			0	18 Dec 2020		16:31	CN	сом	Take Instructions, initial Letters	PSL01	P	



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3. The Document Signing Status Window opens, and a message appears confirming the Signed document has been downloaded.



- 4. Click OK and close the window
- 5. A PDF copy of the document will be downloaded.
- 6. To view the history of the document, right click on the document in the Attachment section of the Case Diary and select History.



7. Select the version of the document required



NOTE: For more information on Version Control, see the Word and Outlook Manual.



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8. To view the action properties, open the action and click on the Properties Tab. The action type is 'Signed Document'

					Change Action (8	866)			- ×				
Action													
🕂 Generate Document 🥤	Post Time	Note	1	High	🖆 Take Action	🕲 Save							
猶 Open Attachment 🛛 🖌	Complete	🔗 Email		Normal	Assign Action								
🔹 Play Dictation 🛛 🗯	🛋 Print	🔗 Email (Temj	plate) 🖡	Low									
Defa	ult Actions		P	Priority	Assignment								
General Properties Attachment/Documents Action Assignments Other Notes													
Action Status NA	Action Status NA VI Applicable												
Flag 🖓 Clear	Flag					~							
- Publish	-	Priority			ategory								
					Action	0.0	tatute Date						
 None 		 High Normal 											
O Publish Only		Low			Fixed Dated Acti	ixed Dated Action O Critical Date							
 Export Only 		ULOW			🔿 Note		ourt Date						
⊖ All					Appointment	⊖ s	canned Post/Mail	Mail					
					Reminder	0 c	heque Request						
					🔾 Email	() P	hoto ID						
					O Phone Message	\bigcirc N	Ion Photo ID						
Publish Status		Other Propertie	S		Dictation	0 c	orporate Entities						
Communication S	sent	Complete			O Undertaking		MS Message						
		Billable			Signed Docume	nt							
		Documents	s Processed	d									
		Know Your	Client										
									Ok Cancel				

9. Complete the Action.

From the Document Manager

1. Right click on the document to be updated and select 'Check Document Signing Status'.



- 2. Click Update.
- 3. The following dialog box appears. Click OK to close.



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- 4. A PDF version of the document will be download.
- Use the History option to view previous versions of the document.
 NOTE: See the Word & Outlook Manual for more information of Version Control.
- 6. From this screen we can see the status of the document.

(Docume	ent Signing Statu	S			2
Carol Nolan Requested by	2		10 Sep 2020 Requested Date	10:39:00 AN	л 🛄			
sent Current Status			Download Signed Document		9		Resend	2
Cancel Cancel Signing			Update Get Current Status		UPDATE			
Routing Order	Signer Name	Sig	ner Email	Occupation	Status		Track Reference	Document
▶ 1	Brenda Hartley	key	housetrainer@gma	Client	sent \land	Þ	7176	Letter of Authority to take u
	Jibby Jacob		ob@keyhouse.ie	Client Contact	created			
<					>		<	>

Requested byWill show the name of the handler who sent the
requestCurrent StatusWill show the current status of the document –
In this case that it has been sent.



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Cancel Signing	Will enable the handler to cancel the request for a signature
Requested Date	Will show the date and time that the document was sent
Signed Document	Will enable the handler to download the signed document as a PDF
Get Current Status	Will enable the handler to update to the current status of the document
Resent Document	Will enable the handler to resend the document if necessary.

The document is sent to the first signer. It will only move to the next signer once it has signed by the first one.

Signing Documents

How to Sign a Document

1. Open the email notification will be received.



2. Click 'Review Document'.



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Please Review & Act on These Documer	nts		DocuSign
Please need the Declaratic Percent and Symphotic Declarations		CONTINUE	OTHER ACTIONS +
	The Mangare Bank of Salon 23 High Street Sound Co. Dolon		
	HE: Property: 5 The Hay rule, Salline, Co Kilaro Account No. 8520997		
	Dear Sinn, We, Bronde Harrity & Jihy Janoh henrity introvenably authorise the Terri of San Grabin & Rume, Soldanton Su at we mar heldell' in popera of the sale of an insorte and so hearly authorize/so Garbin & Rume in sale up our Tritle Double en Accountable Receipt for the puspose of the sale of the property.		
	SKARD Date 25-10 mm		
	NAME:		
	SIGNED Date		

- 3. Then tick the box to agree to use electronic records and signatures. Click Continue to sign the document.
- 4. Click on the Sign button to add your signature.

	@ @ ±* 🗗	₽ 0
START		Address: IMI Campus Sandyford Dublin 16
	The Manager, Bank of Sutton 23 High Street Sutton Co, Dublin	
	RE: Property: 5 The Haywain, Sallins, Co F Account No. 85236987	ülare
	Dear Sirs, We, Brenda Hartley & Jiby Jacob hereby irrevocabl Solicitors to act on our behalf in respect of the sale. Runne to take up our Title Deeds on Accountable R	of our house and we hereby authoriseSoo Grabbit &
	SIGNED:	Date: 17-11-2020
	NAME: Brenda Hartley	
	SIGNED:	Date:
	NAME:	

5. From this screen you can modify your name and/or initials. Click 'Change Style' to choose a different signature.

Adopt Your Signature	×
Confirm your name, initials, and signature. * Required	
Full Name* Initials* Brenda Hartley BH	
SELECT STYLE DRAW	Change Style
Bounda Hartley BH	Change style
By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initial my agent) use them on documents, including legally binding contracts - just the same as a per-and-paper signature or initial.	als for all purposes when I (or
ADOPT AND SIGN CANCEL	



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6. To create your own signature, click the Draw option and add your

signature.

,,	signature.		
Required			
ull Name*		Initials*	
Brenda Hartley		вн	
RAW YOUR SIGNATURE			Cle

7. Click on the signature or initials to be uses to sign and then click Adopt and Sign.

DocuSign Envelope ID: 4A16AEE5-506D-4A96-8857-88AA9079C1E8	DEMONSTRATION DOCUMENT ONLY PROVIDED BY DOCUSION ONLINE SIGNING SERVICE 909 3rd Ave, Suite 1700 + Seattle • Washington 98104 • (208) 215-8200
LETTER OF /	AUTHORITY
	Address: IMI Campus Sandyford Dublin 16
The Manager, Bank of Ireland 23 High Street Satton Cu. Dublin	
RE: Property: 5 the Haywain, Sallins, Co I Account No. 85236987	Kildare
Dear Sirs,	
We, Brenda Hartley and Jibby Jacob hereby irrevoc Solicitors to act on our behalf in respect of the sale Rume to take up our Title Deeds on Accountable R	of our house and we hereby authoriseSoo Grabbit &
SIGNED:	Date:
Brenda Hartley	
SIGNED:	Date:

8. Click Finish at the top of the page. The document will then be sent to the next signer or returned to the sender.



9. You will be asked to if you want to set up a DocuSign account.

Save a Copy of Your Docu	ment	± - = -
Sign up for a FREE DocuSign account today	and sign all your documents ele	ectronically.
Email bhartley@keyhouse.ie Password Confirm Password		Electronically sign any document. Get signatures from others. Sign on the go with DocuSign Mobile!
Country select By clicking the 'SUBMIT' button, you agree to the Terms & Conditions (<u>G</u> ² and Priviso) Policy (<u>G</u> ²).		
SUBMIT NO THANKS		

10. Complete the required information to set up the account, otherwise click No Thanks.



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Other Options

In addition to signing a document, other options are available. To see these options, click Other Actions.

1. Click Other Actions and the following dropdown list appears.



Finish Later	Will save any changes made and allow the user to
	return at a future time.
Print & Sign	Will enable the user to sign the document and
	print it.
Assign to Someone Else	Will enable the user to forward the document to
	another person with having signed it.
Decline to Sign	Will allow the user to refuse to sign the document
	and send a notification to the sender.
Help & Support	Help & support on the DocuSign website
About DocuSign	Information about DocuSign from their website
View History	Will enable the user to see the history of the
	document – when it was created, sent, viewed and
	signed and by whom.
View Certificate (PDF)	Provides a copy of the Digital Certificate for the
	document



	· · · · · · · · · · · · · · · · · · ·
View Electronic Record	Provides a copy of the Agreement agreed to when
and Signature	the user ticks 'I agree to use electronic records and
Disclosure	signatures'.
Session Information	Will give information in relation to the sender,
	recipient, document version.

Assign to Someone Else

If you choose to assign the document to another user:

1. Open the email notification will be received.



2. Click 'Review Document'.

Please Review & Act on These Document	ts			DocuSign
Team and the Boldon And And And And And And And And And An	The Manage The Manage Management of the Second Se	atheniue the firm of Soc Grabbit & Rossee, Dense and we hereby automiceSoc Grabbit &	COTINUE	CINERACTION -

- 3. Then tick the box to agree to use electronic records and signatures. Click Continue.
- 4. Select Other Options.



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5. Select Assign to Someone Else.

ment.	FINISH	OTHER ACTIONS •	
@ @ ¥* ⊒ ば ®	Finish Later		
DocuSign Envelope ID: 2931F429-0929-4916-BF0C-C61A4A50D81A DEMONSTRATION DOCUMENT ONLY PROVIDED BY DOCUSION ONLINE SIGNING SERVICE 999 3rd Ave, Suite 1700 - Seattle - Washington 98104 - (206) 219-0200 LETTER OF AUTHORITY Address: IMI Campus - Sandyford Dublin 16 The Manager, Bank of Ireland 23 High Street Sutton Co. Dublin	Print & Sign Assign to Some Decline to Sign Help & Support About DocuSig View History View Certificate View Electronic Disclosure Session Information	: 더 n 더 (PDF) 더 Record and Signature	
RE: Property: 5 the Haywain, Sallins, Co Kildare Account No. 85236987			

6. The following dialog box will appear

Assign to Someone Else	×
Pequied	
Email Address for the New Signer *	
skelly@keyhouse.ie	
New Signer's Name *	
Sarah Kelly	
Please provide a reason for changing signing responsibility Can you please check this is the correct account number and sign the document for me.	
165 characters remaining	_
Selecting the Assign to Someore Else button will send a notification to the person to whom you assigne this envelops. The original sender will also receive a notification. You will be added as a Carbon Copy (C recipient).	d (7)
ASSIGN TO SOMEONE ELSE CANCEL	

- 7. Enter the details for the new signer and the reason for the change.
- 8. Click Assign to Someone Else.

Decline to Sign a Document

Occasionally it may be necessary to decline to sign a document. This can be done using the Decline to Sign option under 'Other Options'.



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How To Guide

1. Open the email notification will be received.

DocuSign Damo Sustem -	<dse_demo@docusign.net></dse_demo@docusign.net>	S Reply	S Reply All	→ Forward
To Brenda Hartley	use_demolerootasgninet>			Thu 9/10/2020 10:3
If there are problems with how this mess Click here to download pictures. To help	age is displayed, click here to view it in a web browser. protect your privacy, Outlook prevented automatic download of some pictures in this message.			
	Reprive a same Arun Vasu sort you a document to review and sign. REVIEW DOCUMENT Keyhouse admin@keyhouse.le Brnda Hartiey. Please DocuSign Letter of Authority to take up Deeds_7176 pdf			
	Thank You, Keyhouse			
	Do Not Share This Email This email contains a secure link to DocuSign. Please do not share this email, link, or access with others. Alternate Signing Method Vial DocuSign.on, dck Access Documents', and enter the security code: 0ATCS300693D0409780F239CAD4D03E3D1	s code		

2. Click 'Review Document'.

Please Review & Act on These Document	its		DocuSign
	Selicitory to get on our bahalf in mar	Millio, C.X.Matry	STARE ACTIONS +

- 3. Then tick the box to agree to use electronic records and signatures. Click Continue.
- 4. Select Other Options.
- 5. Select 'Decline to Sign' from the dropdown list.





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6.

Caution	
If you select CONTIN	UE, this document will be voided.
To request changes t request.	o this document, please select CANCEL and contact the sender directly with you
You can exit signing a	and save the information you've entered by using the FINISH LATER option in th enu.

- 7. Click Continue to proceed
- 8. You can enter a reason for declining and then click Decline to Sign.

Decline to Sign					
Please provide a reason for declining:					
Please modify the account number to 8526897					
457 characters remaining					
5					

9. The document will not be forwarded to the next person in the list.

Adding the Signing Status to the Grid

To enable users to monitor the progress of a document sent for signature, the Sign Status can be added to the Grid.

1. Right click on the Headings Row and select 'Show Column Chooser'.

Case: HAR	003/0002			Brenda Hartley Sale of 5 The Haywain, S	al	Column Chooser
Search		8	🗌 Se	arch Contents		Diary Time Document Time
	1	Document Name			1	Precedent DS Signing Status
F 🔞		Letter of Author		Group By This Column		
		Section 150 Lett		Show Group Panel		
		Client Questionr		Best Fit		
		Initial Letter to C	₩÷	Best Fit (all columns)		

2. Drag 'Signing Status' to the Headings Row and drop where required.



3. Then save the view by clicking on View Button then, right click on View and select Add or Edit Views.

	S	Standard View 👎
Standard View	View 🕂 Add or Edit views	
DocuSign		
By Document Class		
By Document Types		
Email Received		
Emails		
Exclude Dictations		
Shared Documents		

4. Enter a view name. If you want this to be the default view for this screen, tick Default and then click Add View. If you have Supervisory access, then the view can be made available to all users by clicking Shared View.

		Standard View 😐 📃
Name: DocuSign		🗌 Default 🗌 Shared View 🗛 Korew 😵
	View	Default Shared
Standard View		\checkmark
By Document Class		
By Document Types		
Email Received		
Emails		
Exclude Dictations		
Shared Documents		

5. The field is now permanently available on the Heading Row.