

# DocuSign with Keyhouse

## How To Guide

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## How To Guide

# Use DocuSign

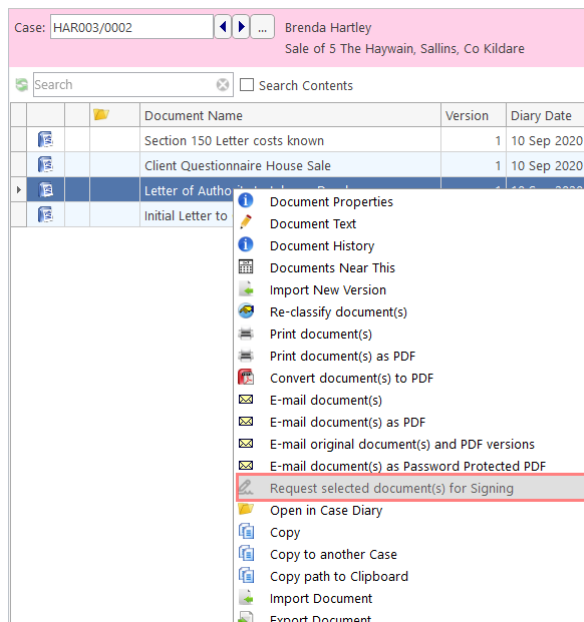
## Overview

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.

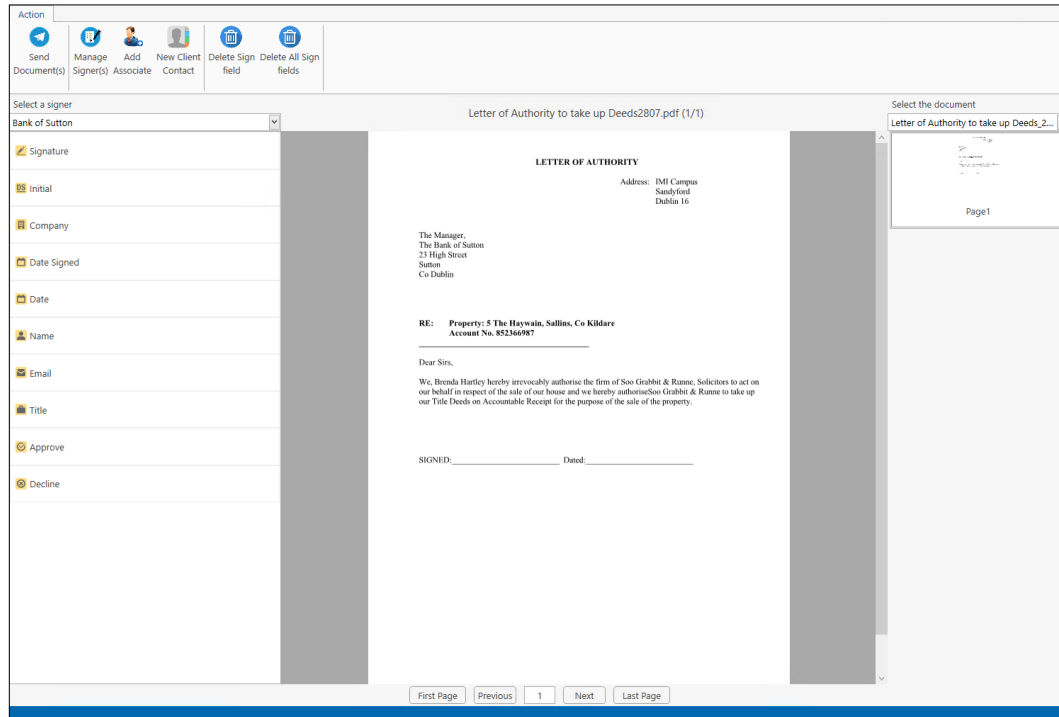
## Adding Signatures to a Document

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'.

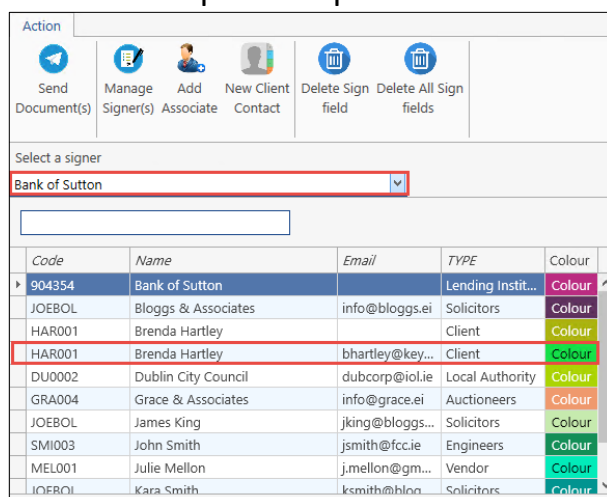


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- The following window opens. It can be resized for ease of use.



- 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.
- To add the headings to the document, select the client or associate name from the dropdown option.



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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.

**LETTER OF AUTHORITY**

Address: IMI Campus  
Sandyford  
Dublin 16

The Manager,  
Bank of Sutton  
23 High Street  
Sutton  
Co. Dublin

**RE: Property: 5 The Haywain, Sallins, Co Kildare  
Account No. 85236987**







Dear Sirs,

We, Brenda Hartley and Jiby Jacob hereby irrevocably authorise the firm of Soo Grabbit & Runne, Solicitors to act on our behalf in respect of the sale of our house and we hereby authorise Soo Grabbit & Runne to take up our Title Deeds on Accountable Receipt for the purpose of the sale of the property.

<p>SIGNED: <span style="border: 1px solid black; padding: 2px;">SIGN Brenda Hartley bhartley@keyhouse.ie</span></p> <p>NAME: <span style="border: 1px solid black; padding: 2px;">NAME Brenda Hartley bhartley@keyhouse.ie</span></p> <p>SIGNED: _____</p> <p>NAME: _____</p>	<p>Date: <span style="border: 1px solid black; padding: 2px;">DATE Brenda Hartley bhartley@keyhouse.ie</span></p> <p>Date: _____</p>
---	--

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.

Action

 Send Document(s)	 Manage Signer(s)	 Add Associate	 New Client Contact	 Delete Sign field	 Delete All Sign fields
---	---	--	---	--	---

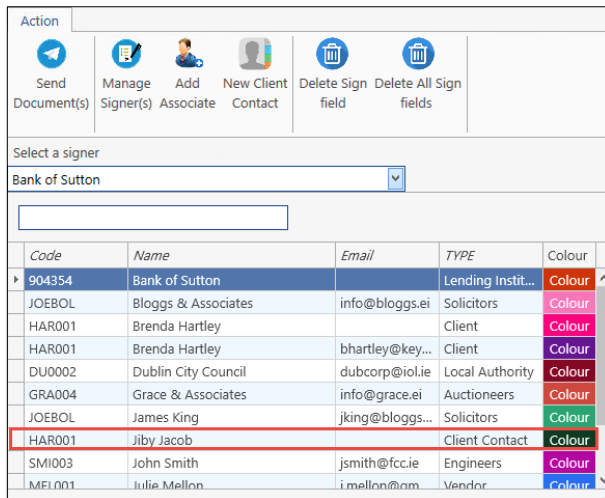
**Manage Signer(s)** Will enable a signer to be added for this document only

**Add Associate** Will enable a new Associated to be added to the matter using Associates Screen

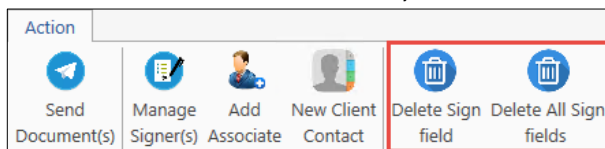
**New Client Contact** Will enable a new Client Contact to be added to the Client using the Client Contact Screen

10. Once the name has been added, select from the drop-down list and drag into position.

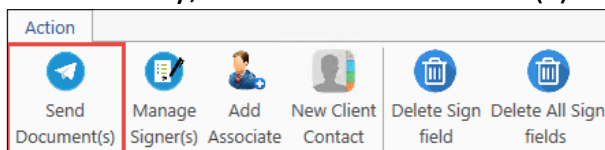
## How To Guide



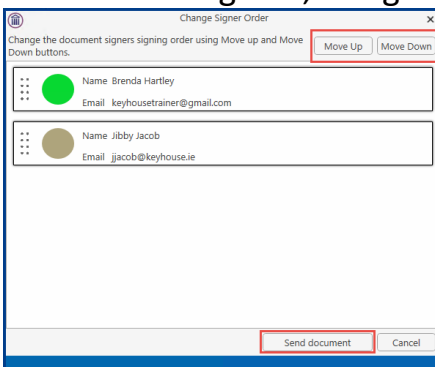
- To remove a field from the page, click on the field and select 'Delete Sign field'. To remove all fields, select 'Delete All Sign fields'



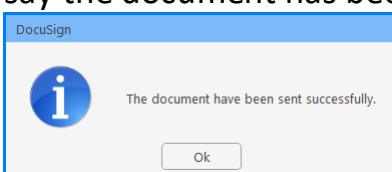
- When ready, click 'Send Document(s)'



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



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



## How To Guide

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



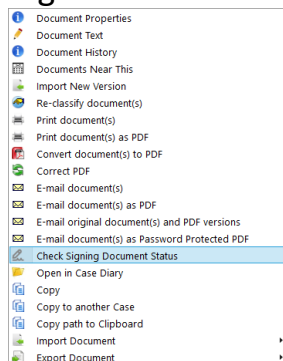
Date	Time	Handler	Synopsis	Team	Action Co..
08 Oct 2020	10:36	CN	Critical Date - Completion Date	COM	G23
10 Sep 2020	16:18	CN	Remind Client to return signed Authority	COM	PSL02
10 Sep 2020	10:39	CN	The below document(s) were sent for signing by DocuSign - (Signing Status : sent)	COM	ADMAA
08 Sep 2020	16:20	CN	Remind Clients to provide AML Documentation	COM	ADMAA

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

## Cancel the Signing of a Document

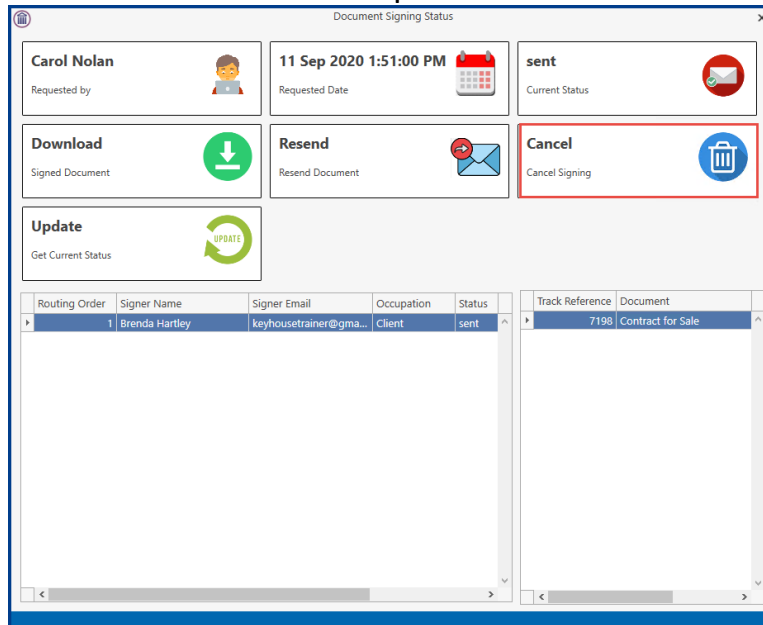
If a document has been sent in error, it can be recalled.

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.

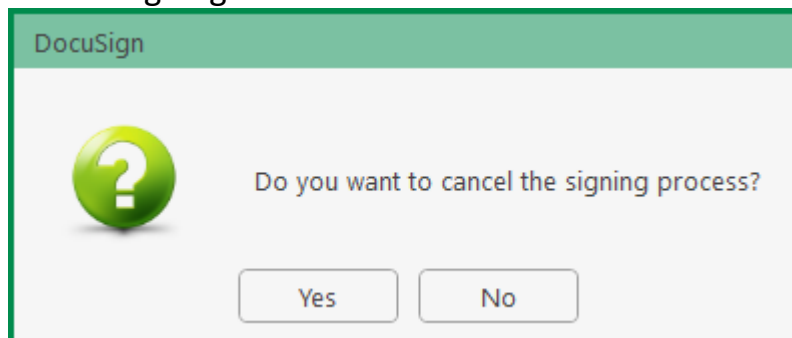


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- The Status Window will open.



- Cancel Signing and click Yes to confirm.

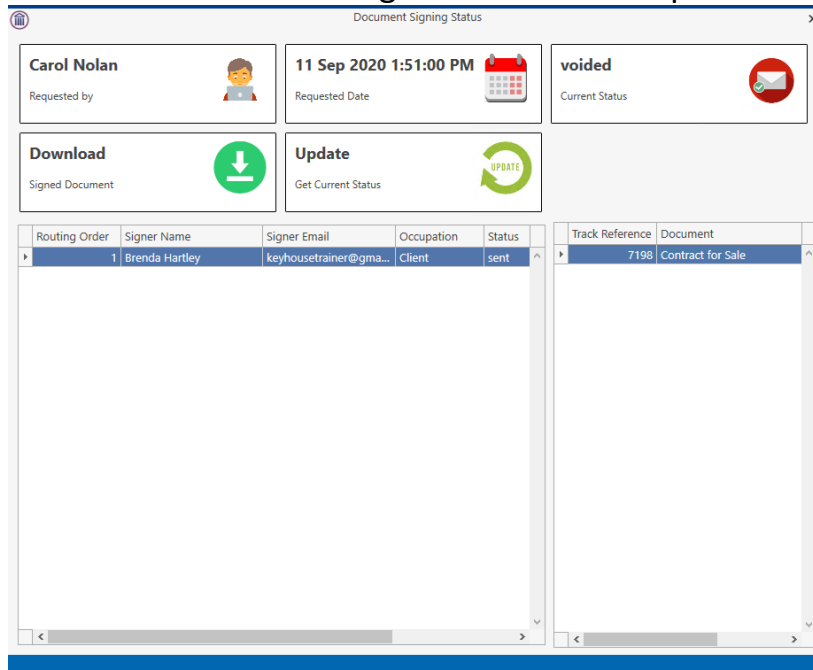


- Click the Refresh Button on the Document Manager.
- Right click on the document again and select 'Check Document Signing Status'.



## 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.

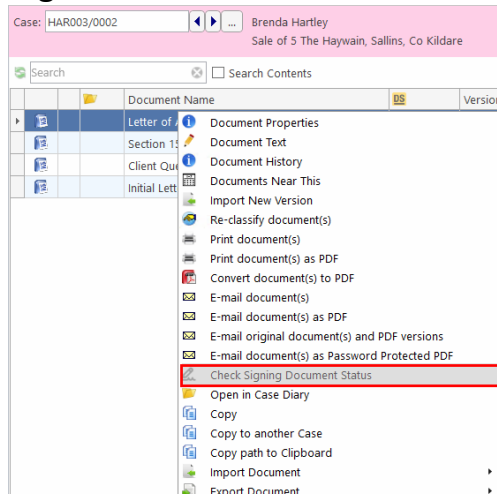


9. Click the Refresh button to update the Document Manager.

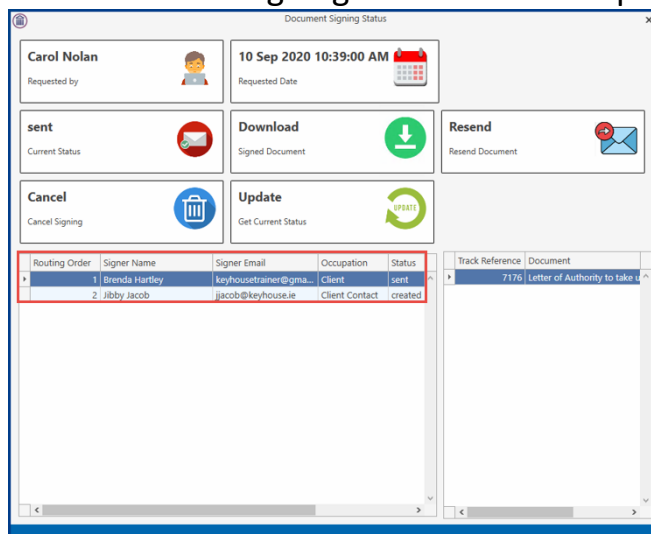
## How To Guide

### 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

## How To Guide

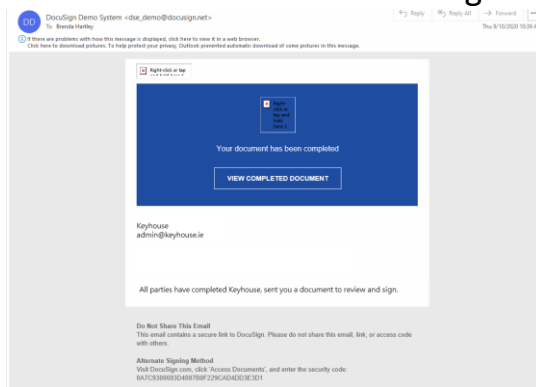
- Declined** The signer has declined to send the document. In this case the document will not be sent to the next signer on the list.
- Assigned** The signer has sent the document to another person to sign.

## 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.



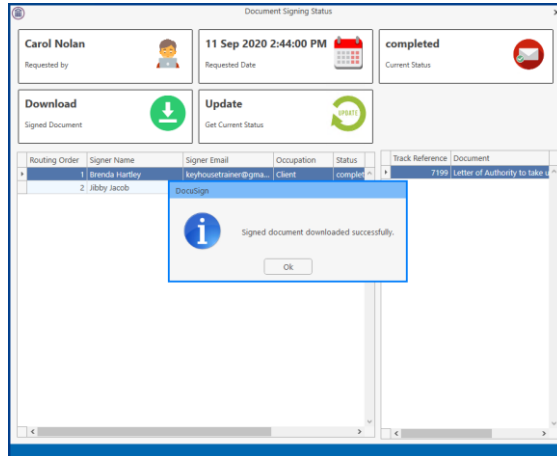
2. Double click on the action in the Case Diary. **Note:** the action is a required action and cannot be deleted.

Case: HAR001/0001    Brenda Hartley    Tel:    F/e: CN  
 Sale of 5 The Haywain, Sallins, Co Kildare

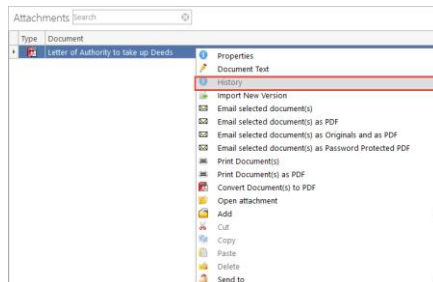
Date	Time	Handler	Team	Synopsis	Action Co...
18 Dec 2020	16:32	CN	COM	Remind Lender to send Title	PSL04
18 Dec 2020	16:28	CN	COM	The below document(s) were sent for signing by DocuSign - (Signing Status : completed)	ADMSG
18 Dec 2020	16:31	CN	COM	Take Instructions, initial Letters	PSL01

## How To Guide

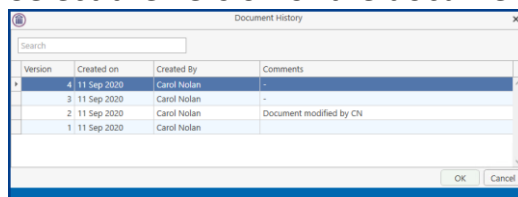
- The Document Signing Status Window opens, and a message appears confirming the Signed document has been downloaded.



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



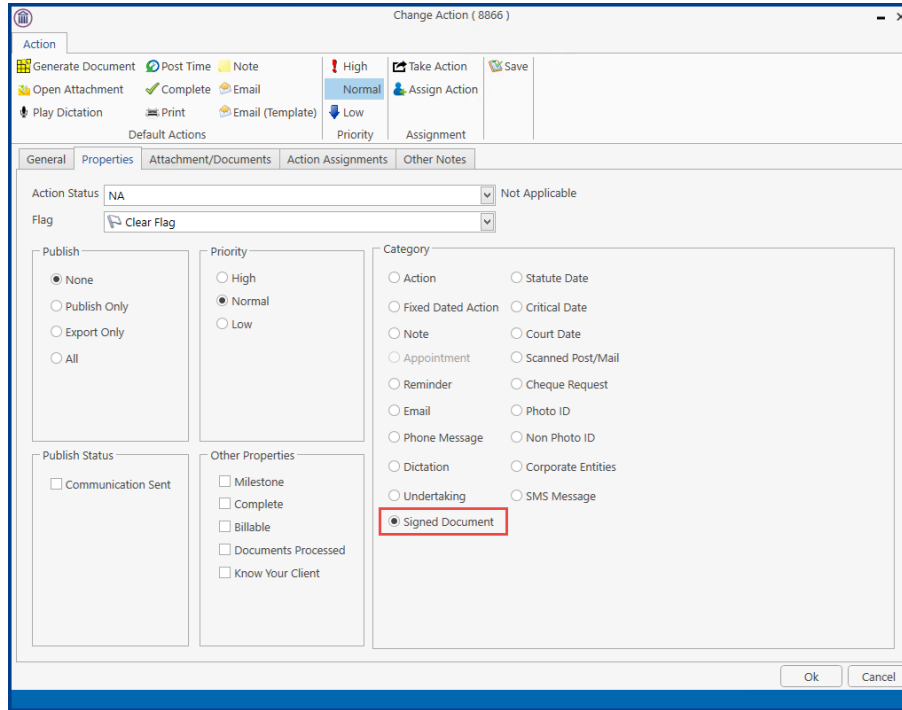
- Select the version of the document required



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

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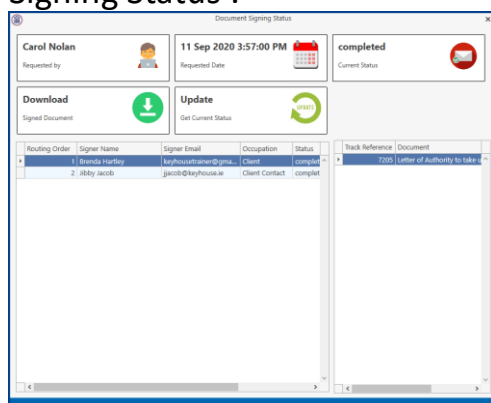
- To view the action properties, open the action and click on the Properties Tab. The action type is 'Signed Document'



- Complete the Action.

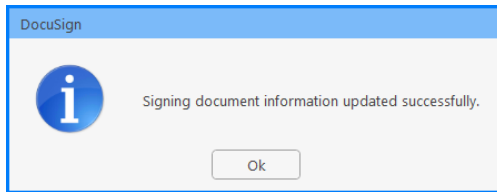
### From the Document Manager

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

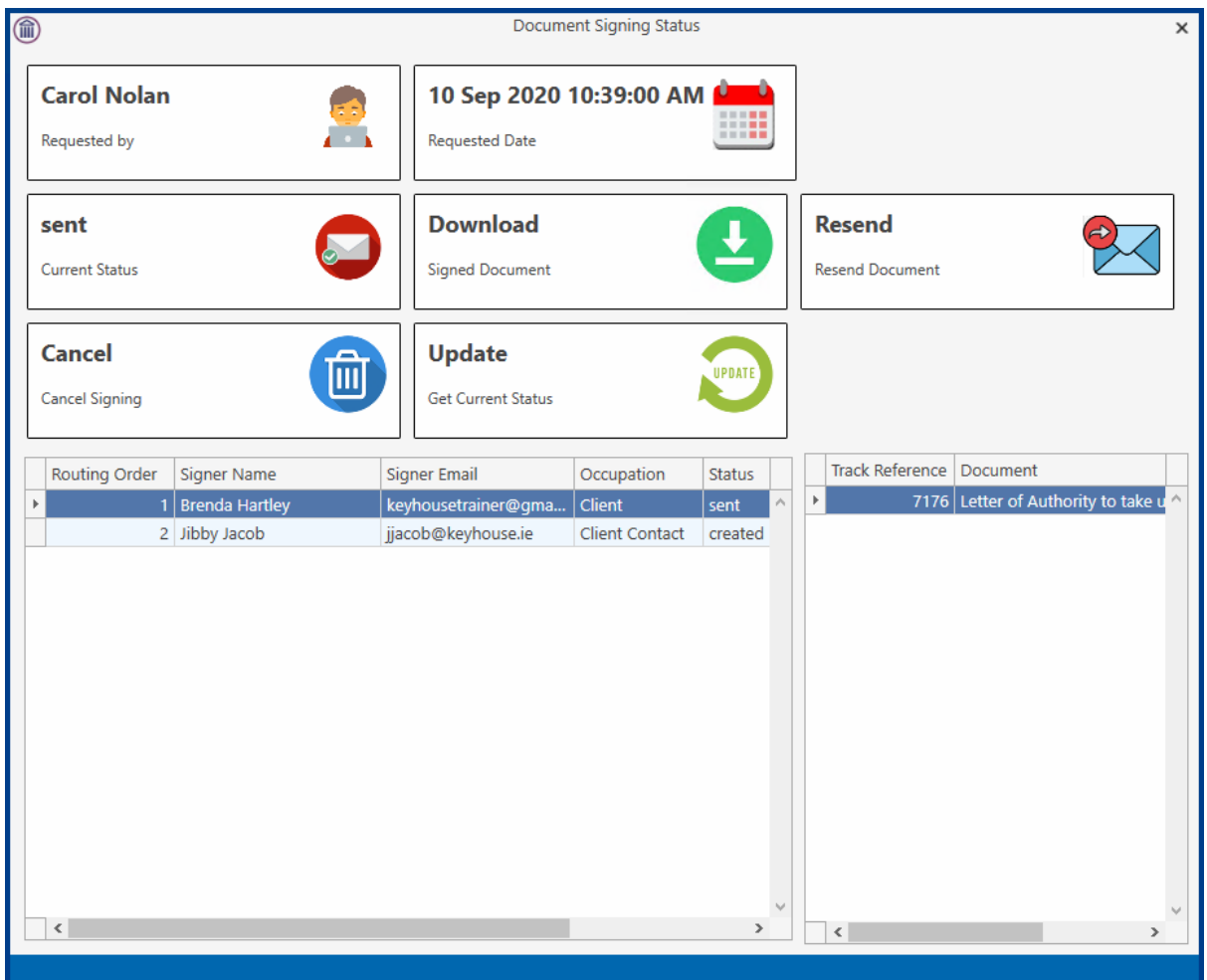


- Click Update.
- The following dialog box appears. Click OK to close.

## How To Guide



4. A PDF version of the document will be download.
5. 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.



Requested by	Requested Date
Carol Nolan	10 Sep 2020 10:39:00 AM

Current Status	Download	Resend
sent	Signed Document	Resend Document

Cancel	Update
Cancel Signing	Get Current Status

Routing Order	Signer Name	Signer Email	Occupation	Status
1	Brenda Hartley	keyhousetrainer@gma...	Client	sent
2	Jibby Jacob	jjacob@keyhouse.ie	Client Contact	created

Track Reference	Document
7176	Letter of Authority to take u

- |                |  |
|----------------|--|
| Requested by   | Will show the name of the handler who sent the request                             |
| Current Status | Will show the current status of the document – In this case that it has been sent. |

## How To Guide

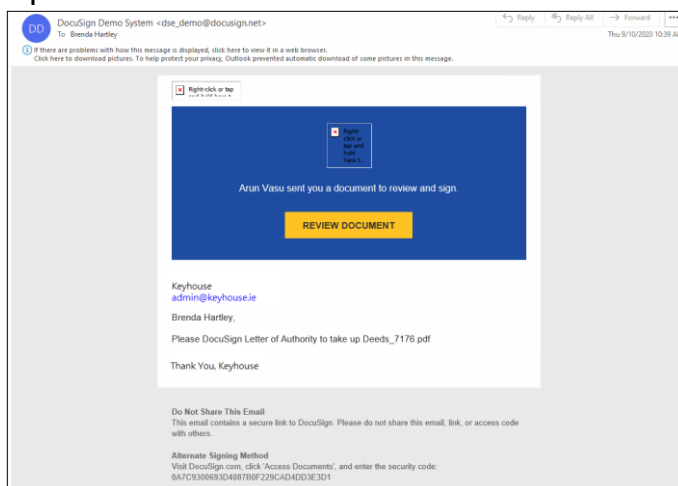
Cancel Signing	Will enable the handler to cancel the request for a signature
Requested Date	Will show the date and time that the document was sent
Signed Document	Will enable the handler to download the signed document as a PDF
Get Current Status	Will enable the handler to update to the current status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

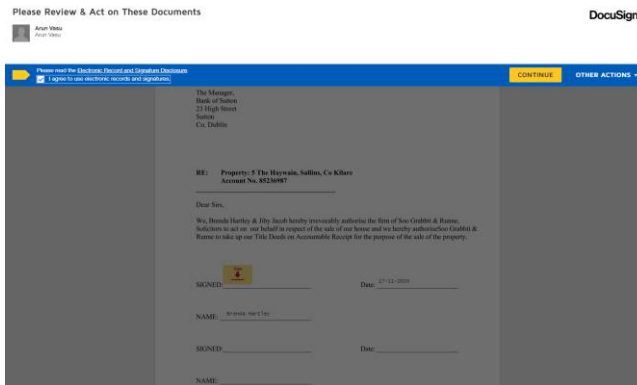
### How to Sign a Document

1. Open the email notification will be received.



2. Click 'Review Document'.

## How To Guide



Please Review & Act on These Documents

DocuSign

Please meet the Electronic Record and Signature Guidelines

I agree to use electronic records and signatures.

**SIGN** OTHER ACTIONS

The Manager,  
Bank of Sutton  
23 High Street  
Sutton  
Co. Dublin

RE: Property: 5 The Haywain, Sallins, Co Kildare  
Account No. 85236987

Dear Sirs,

We, Brenda Hartley & Jiby Jacob hereby irrevocably authorise the firm of Soo Grabbit & Runne Solicitors to act on our behalf in respect of the sale of our house and we hereby authorise Soo Grabbit & Runne to take up our Title Deeds on Accountable Receipt for the purpose of the sale of the property.

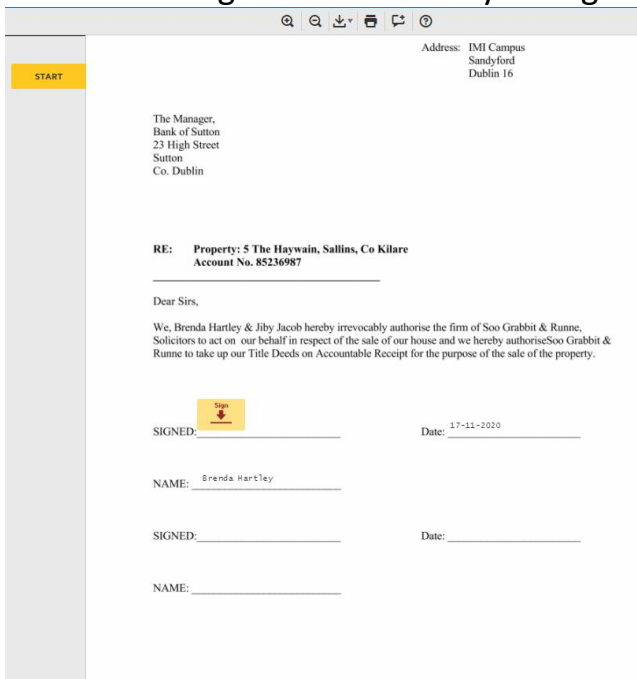
SIGNED: \_\_\_\_\_ Date: 17-11-2020

NAME: Brenda Hartley

SIGNED: \_\_\_\_\_ Date: \_\_\_\_\_

NAME: \_\_\_\_\_

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



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 Kildare  
Account No. 85236987

Dear Sirs,

We, Brenda Hartley & Jiby Jacob hereby irrevocably authorise the firm of Soo Grabbit & Runne Solicitors to act on our behalf in respect of the sale of our house and we hereby authorise Soo Grabbit & Runne to take up our Title Deeds on Accountable Receipt for the purpose of the sale of the property.

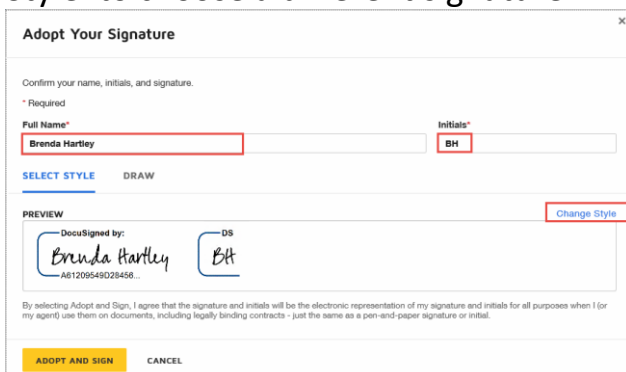
SIGNED: \_\_\_\_\_ Date: 17-11-2020

NAME: Brenda Hartley

SIGNED: \_\_\_\_\_ Date: \_\_\_\_\_

NAME: \_\_\_\_\_

- 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\*

SELECT STYLE DRAW

PREVIEW

DocuSigned by:  
*Brenda Hartley* DS  
A6120649D29458...

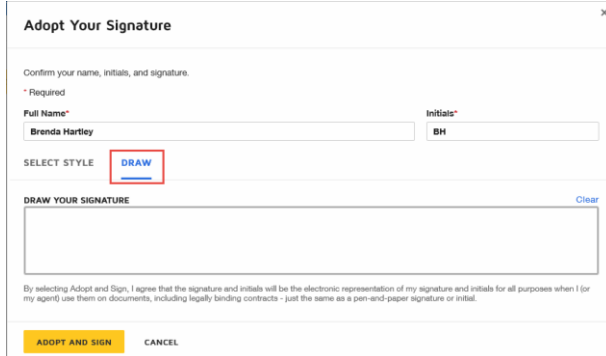
By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

**ADOPT AND SIGN** CANCEL

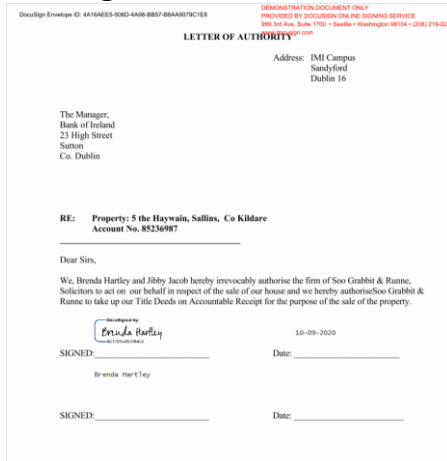


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- To create your own signature, click the Draw option and add your signature.



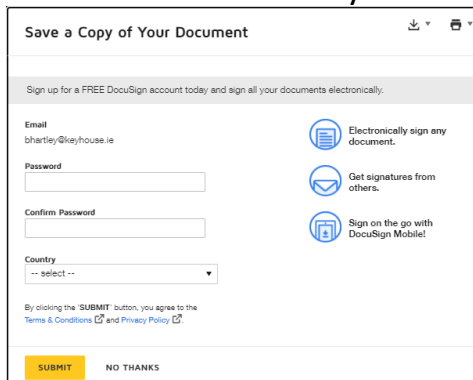
- Click on the signature or initials to be used to sign and then click Adopt and Sign.



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



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



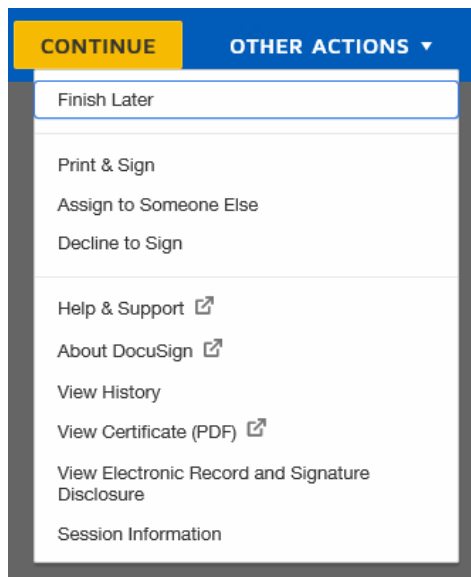
- Complete the required information to set up the account, otherwise click No Thanks.

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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.



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

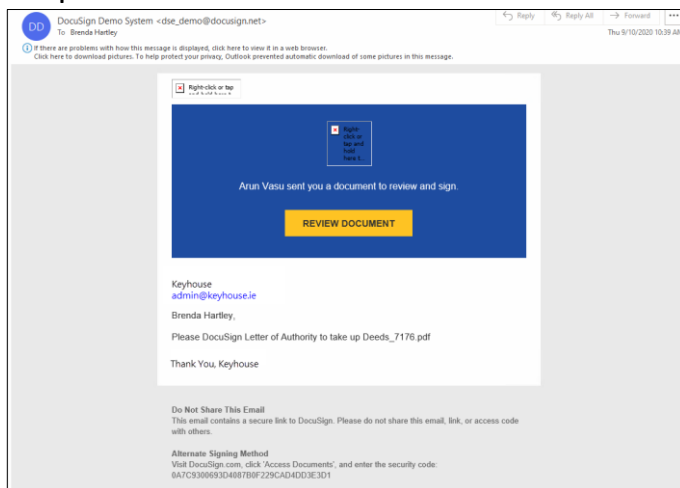
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<b>View Electronic Record and Signature Disclosure</b>	Provides a copy of the Agreement agreed to when the user ticks 'I agree to use electronic records and signatures'.
<b>Session Information</b>	Will give information in relation to the sender, recipient,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

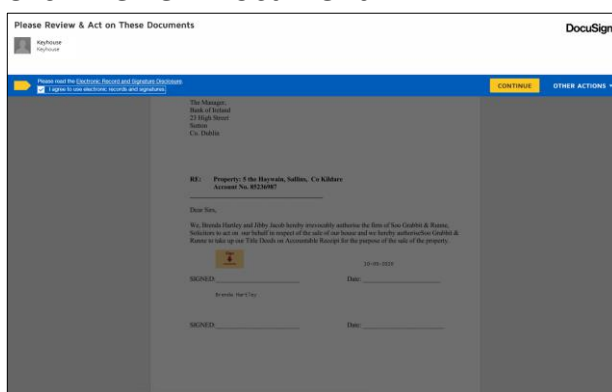
### Assign to Someone Else

If you choose to assign the document to another user:

1. Open the email notification will be received.



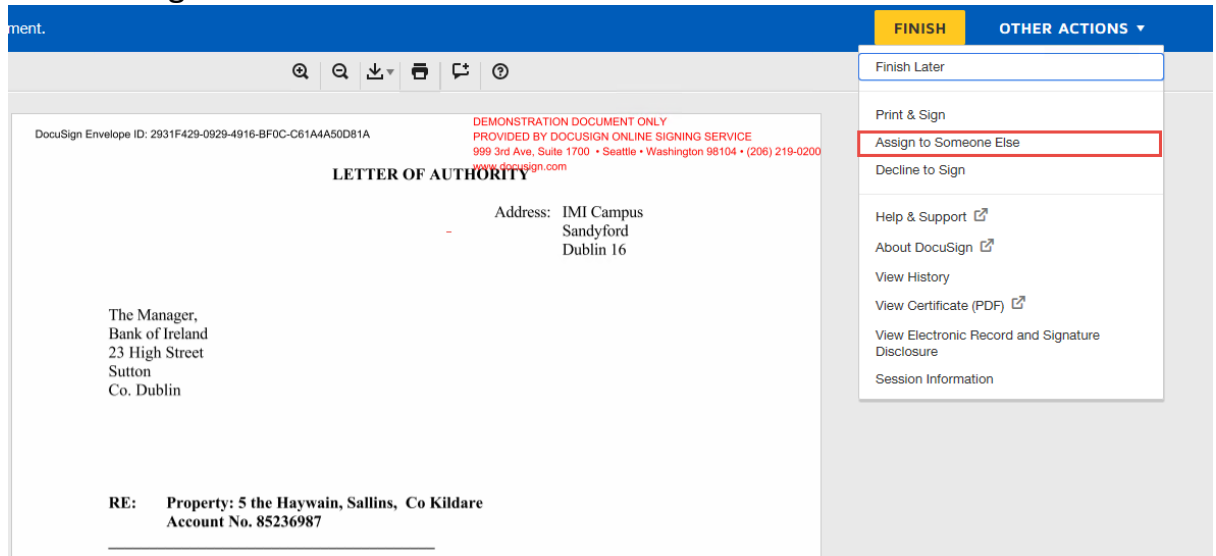
2. Click 'Review Document'.



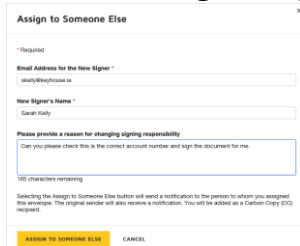
3. Then tick the box to agree to use electronic records and signatures. Click Continue.
4. Select Other Options.

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### 5. Select Assign to Someone Else.



### 6. The following dialog box will appear



The "Assign to Someone Else" dialog box contains the following fields and text:

- \*Required**
- Email Address for the New Signer \*** (text input field)
- New Signer's Name \*** (text input field)
- Please provide a reason for changing signing responsibility** (text area)
- Can you please check this is the correct account number and sign the document for me.
- 100 characters remaining
- Small text: Selecting the Assign to Someone Else button will send a notification to the person to whom you assigned the envelope. The original sender will also receive a notification. You will be added as a Carbon Copy (CC) recipient.
- Buttons: **ASSIGN TO SOMEONE ELSE** and **CANCEL**

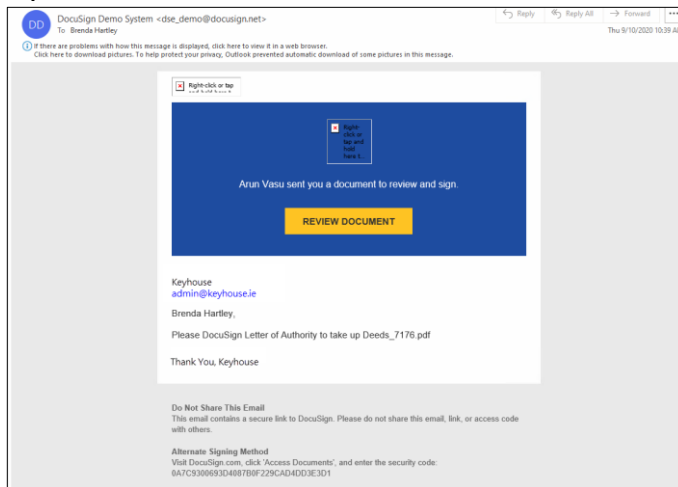
7. Enter the details for the new signer and the reason for the change.
8. Click Assign to Someone Else.

## Decline to Sign a Document

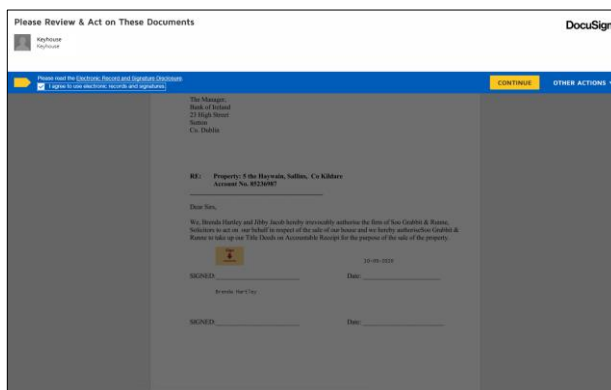
Occasionally it may be necessary to decline to sign a document. This can be done using the Decline to Sign option under 'Other Options'.

## How To Guide

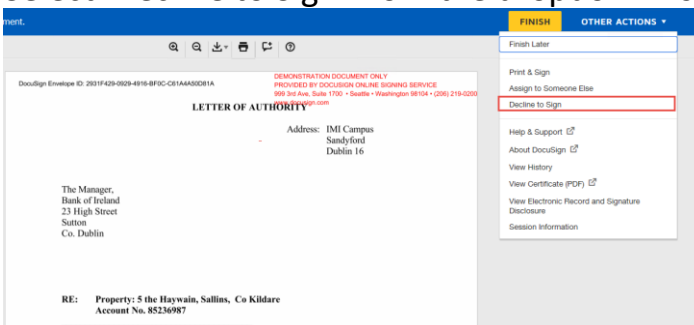
1. Open the email notification will be received.



2. Click 'Review Document'.

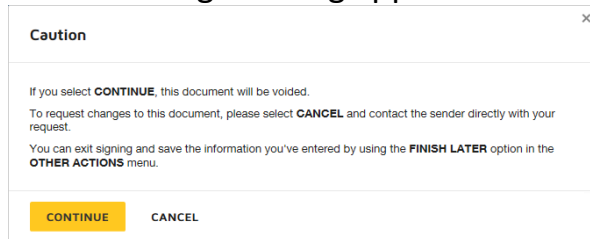


3. Then tick the box to agree to use electronic records and signatures. Click Continue.
4. Select Other Options.
5. Select 'Decline to Sign' from the dropdown list.

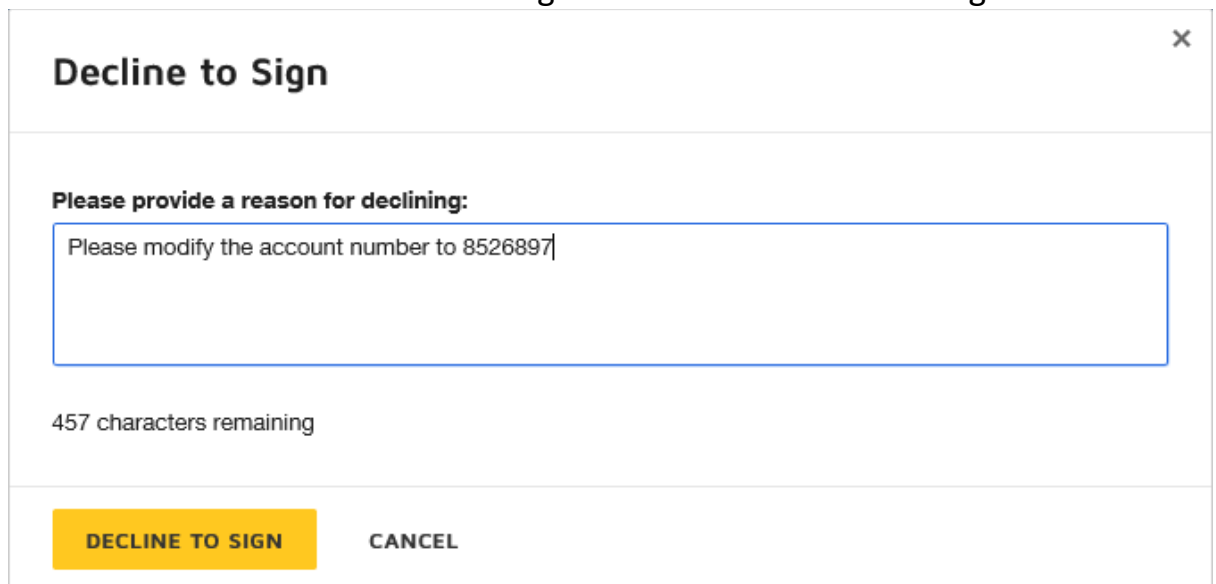


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- The following warning appears.



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

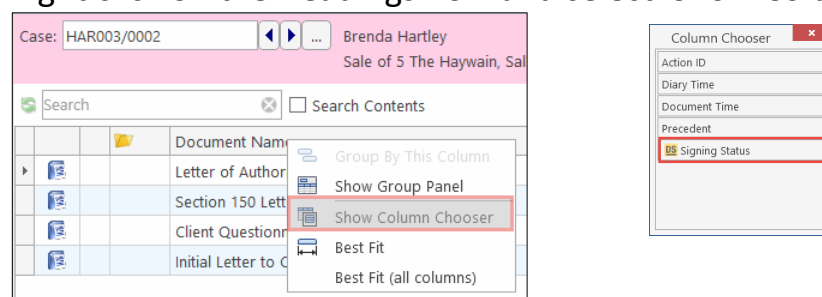


- The document will not be forwarded to the next person in the list.

## 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.

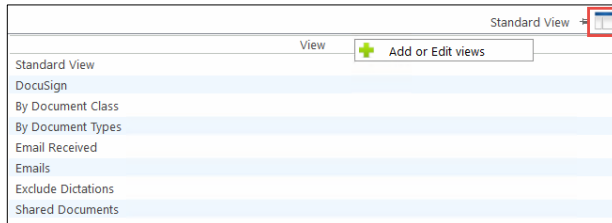
- Right click on the Headings Row and select 'Show Column Chooser'.



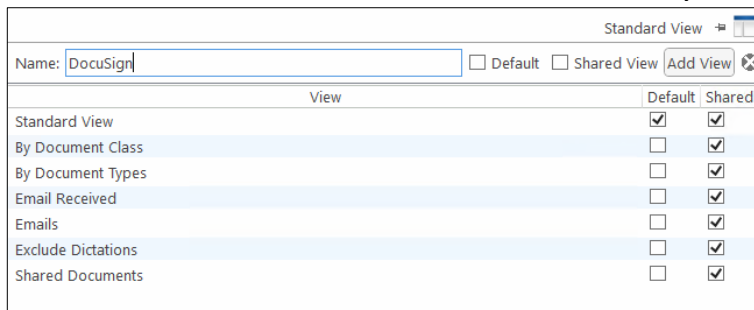
- Drag 'Signing Status' to the Headings Row and drop where required.

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



- 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.



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