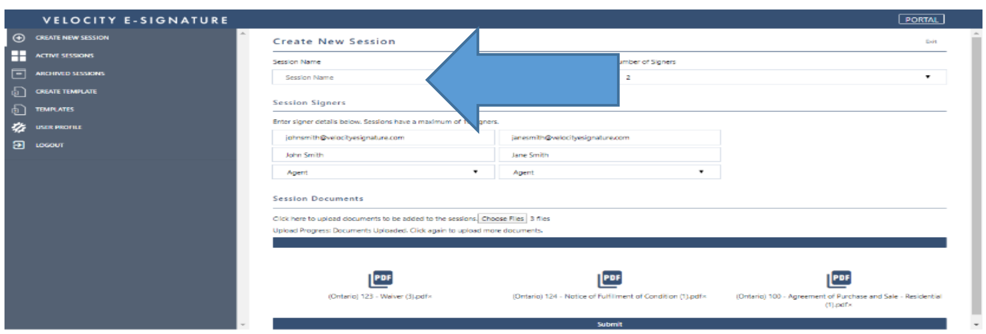
Creating a LIVESIGN session (9 steps):

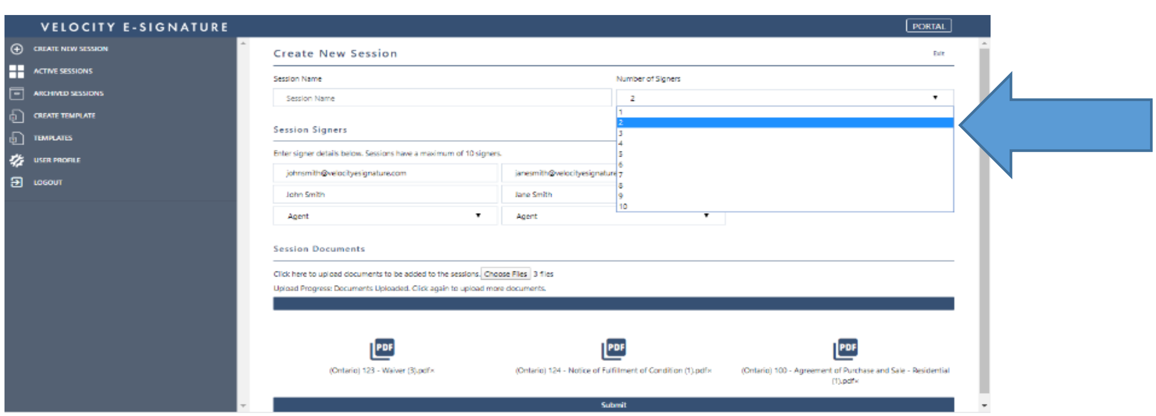
In order to use LIVEsign you must subscribe to the LIVEsign Platform. You can do this in the **user profile** section by updating your subscription plan.

1) Click **create new session** from the dashboard or from the list on the left side of your screen.

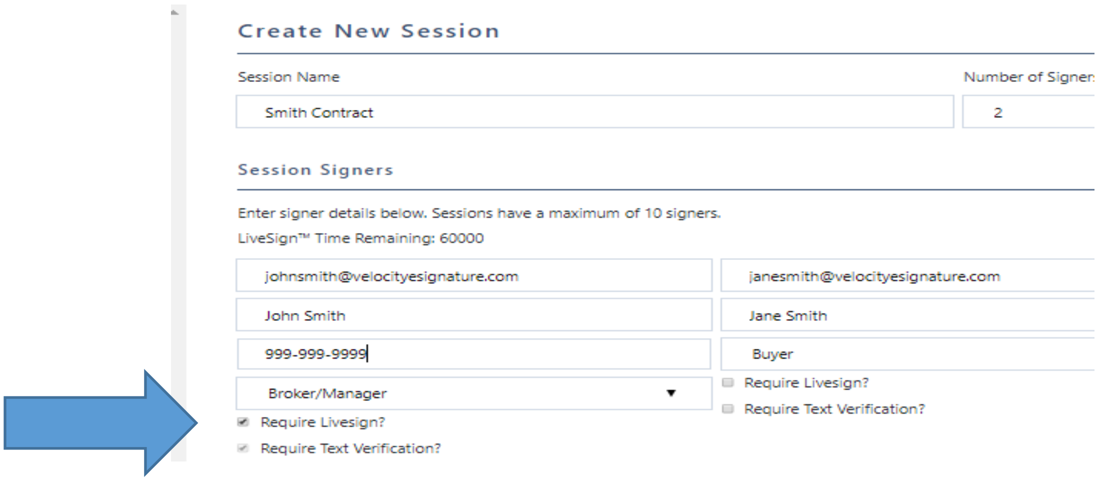
2) Enter in the **session name**. This name will be used as the session name for future reference.



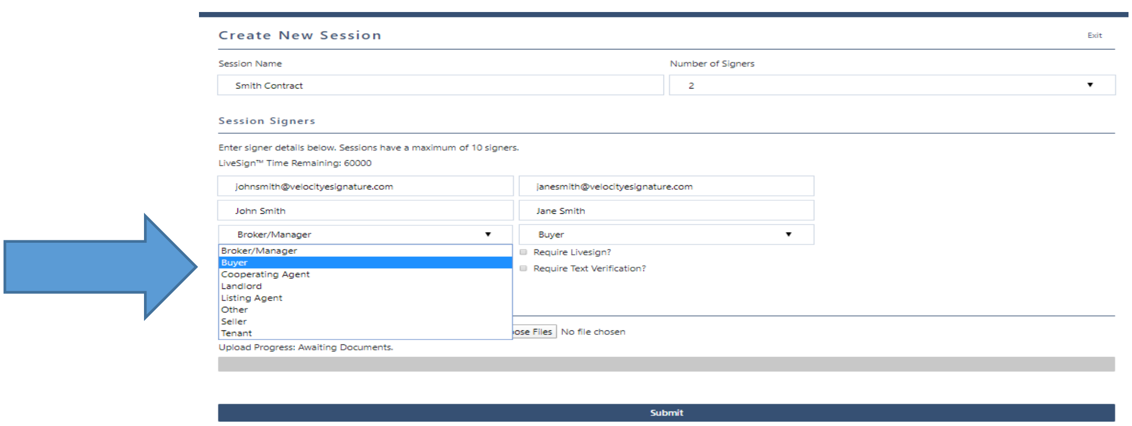
3) Select **number of signers** and choose the total amount of people who will be signing the documents, including yourself.



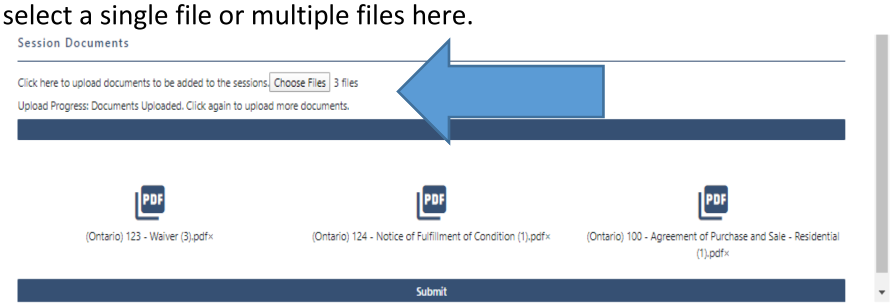
4) Enter **all signer information**. This includes signer full legal name, email address to send documents to and type of signer. **Ensure that LIVEsign is selected here**. You will be prompted for the signer's phone number for verification.



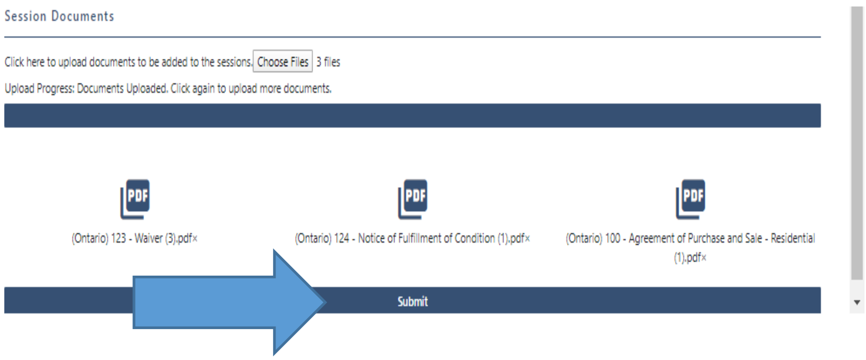
5) Choose the type of signer from the dropdown list. These may vary between enterprise users and industry. This will be used for templates and AutoPopulate™ documents to prepare the document for signature. If you are unsure select other.



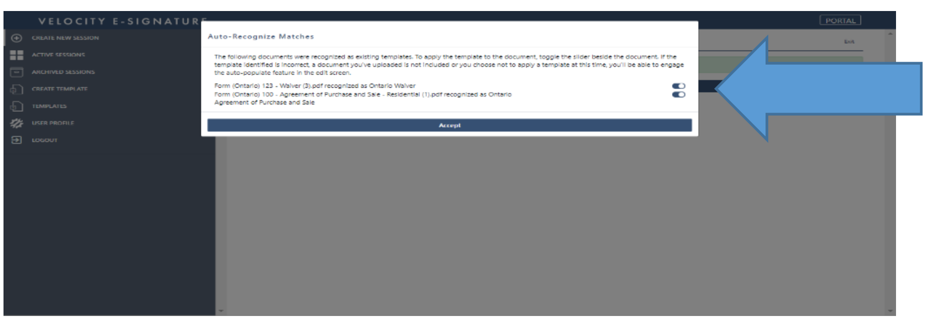
6) Select Choose Files – this will prompt to upload the PDF files required for signature. You can select a single file or multiple files here.



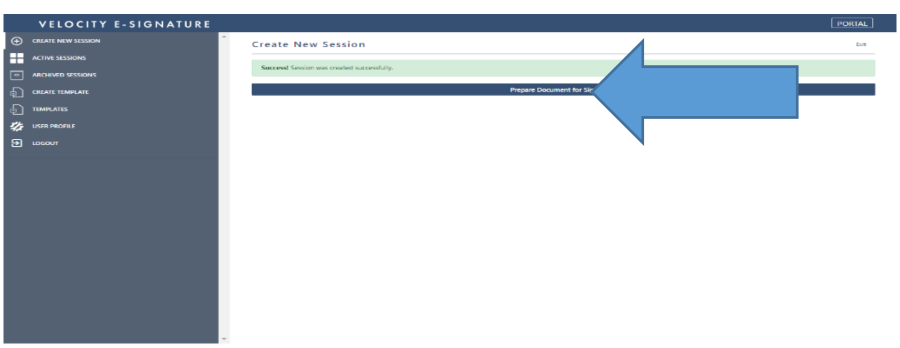
7) Once files are uploaded select Submit to create your signing session and move on to marking it up for signature.
    a. If you upload an incorrect file you can delete it by clicking the “x” beside the file.
    b. You can also select choose files again and upload additional files if you missed any.



8) After clicking Submit, the platform will check to see if it recognises any of your files from the template database using the AutoRecognise™ feature. If any files are recognised, you will see this screen. Choose the files you want to automatically by clicking on the toggle button to have signature locations placed on the document for you. We recommend toggling all files on to save time here. If you do not see this you will be prompted to prepare for signature (Step 9).



9) Your files are ready to be marked for signature. Click prepare documents for signature to begin preparing/reviewing the documents.



You will now be taken to the edit document pages. See edit document tutorial for additional information.