

This template PDF is designed to help guide you through each of the edit functions within the Velocity E-signature platform. Follow the steps below and within minutes you will be prepared to use all of the functions available and most important, ready to send and receive signatures with ease!

Step 1: Placing an element

On the left side, select . Signers names will now appear below. Choose one of the signer names and move the mouse to here _____. Great, your first signature has been placed! Notice that you can continue placing the same element and place another signature request. Try that here _____. Now press escape.

After you are complete with a specific signer or element you need to press escape to be able to move and resize, which we will try next.

Step 2: Moving, resizing and deleting a placed element

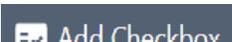
Navigate to the paragraph above with the mouse and press and hold the left mouse button on the first signature location you placed. Continue holding the button and drag the signature box across the screen to here _____. Letting go of the mouse button places the signature box in the new location.

Next, click and drag from the bottom right corner of the signature box above to resize. You can resize the signing location to fit in a certain area.

To delete an element, click the small “x” in the top right corner of it.

Not that all elements (Signatures, Initials, Dates, Text boxes, Checkboxes and signer input requests all work the same.

Step 3: Add one of each remaining element

 here _____.  here _____.

 here _____.

 here _____. In order to type into a textbox you need to double click on it. You can type or paste information here. Try typing into it with a name. Let's use **John Smith**.

If the text placed or types is larger than the box, it will still be there, but you will need to resize the textbox. The executed document will show exactly how the textbox is placed, but it will NOT show the border you see. This is here for sizing purposes. You can also drag a textbox to a specific position the same way you did with the signature box earlier.

Add Signer Input

works similar to a textbox, however this is an empty text field that a signer is required to fill in when they sign. It will count as a mandatory element and will be included in the signer's progress count. This is often used for signers to place their own name, address, credit card etc.

Go ahead and place a signer input box here _____.
Great, when we practice signing this session you will be able to see how the input box works.



Add Strikeout

adding a strikeout on a document utilizes the left mouse button and drag features used previously. Click add strikeout and bring the mouse to the area you would like to place the strikeout. Once in place, press and hold the mouse button. While holding draw a line either vertically or horizontally (from left to right) to place the strikeout. You can resize, move and **delete**.



Try placing a small horizontal strikeout and put a line through the word delete in red above.

Now try placing a large strikeout through the paragraph above. We have placed two red dots for a start and end point.

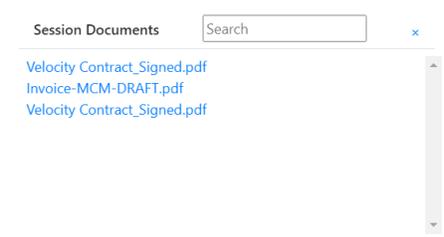
Leave a comment

You can leave a comment for a signer to see when they are signing a specific signing location. This comment will appear once they select that specific location to sign, and they will be prompted to acknowledge the comment before signing. This acknowledgement will be recorded in the audit trail.

To leave a comment, select one of the signature locations above by clicking on it with the left mouse button.. On the right side type your comment into the comment box and **select save**.

Documents

If you have multiple documents to edit, you can click the documents button and a box will appear with all of the documents in a session. Simply click the document you want to edit and you will be taken to it. You can also search if there are multiple documents in the session. You only may be using one document for this tutorial so this will not appear.



 AutoPopulate

this function works with Enterprise templates. If you are using a standard form that requires signatures, initials or dates that are placed in the same location on the page each time you can set a template up that will automatically place the elements on the page for you. This works great for document that need the bottom right corner initialed and documents that require a signature on the final page. This is a great time saver. Ask your enterprise admin to help set it up!

 Send for Signature

The final step is sending a document for signature. Once you are ready for the document to be signed click this button. You will then be given 3 choices to send:

- 1) Send All. This will send an email to all signers at the same time.
- 2) Selecting Send beside one signers name will send only to that signer. You will need to manually go back and send to additional signers if you choose this method.

Send for Signature Set Send Order

Send for Signature ×

John Smith (johnsmith@velocitysignature.com)	Send
Tim Fennessey (tim@velocitysignature.com)	Send

Send All

- 3) Send in order.

If you select send in order, you can drag the signers in a specific order to sign. Once the order is set, click submit. The first signer will be sent an email to sign. Once they have completed signing, the second signer will then be emailed to sign. Once all signers have signed an executed copy will be sent to all signers, plus the account holder requesting the signatures.



Send for Signature

Set Send Order

Set Send Order ×

1. John Smith (johnsmith@velocitysignature.com) - Sent, awaiting completion...
2. Tim Fennessey (tim@velocitysignature.com) - Unsent

Submit

For the last step in this tutorial select [Send All](#).

We highly recommend that you select the link that is sent out and sign the document yourself to experience the signer's perspective.

This tutorial, along with additional tutorials available by clicking the support button in the dashboard.