

Session portal

The session portal can be found by clicking on the session name on the left side of the screen. You will find your sessions under active or under archived sessions. All sessions stay in active until you choose to move them to archived.

VELOCITY E-SIGNATURE PORTAL

CREATE NEW SESSION

ACTIVE SESSIONS Active / Archived

ARCHIVED SESSIONS

CREATE TEMPLATE

TEMPLATES

USER PROFILE

LOGOUT

SESSION LIST

Search Sessions...

Smith Contract Selected session

livesign text

text

License - 16th Completed session

tract Close Session

ss: 0/9

Edit Session Add Document Add Signer Send For Signature Verified by Velocity Archive Session

Signers

John Smith	johnsmith@velocitysignature.com	broker/manager	0/0		
Jane Smith	janesmith@velocitysignature.com	buyer	0/0		

Documents

(Ontario) 123 - Waiver (3).pdf	View Document	Remove
(Ontario) 100 - Agreement of Purchase and Sale - Residential (1).pdf	View Document	Remove
(Ontario) 124 - Notice of Fulfillment of Condition (1).pdf	View Document	Remove

Start LIVEsign Session

Sessions that are completed are marked with a green checkmark.

Options (Expanded)



- 1) **Edit session** – allows you to go back to the edit pages to adjust or insert new signing locations. Once a document has been signed you are not able to add a textbox or strikethrough. You can still place new initial, signature or date locations.
- 2) **Add a document** – allows you to add additional document(s) for signature to an active session.
- 3) **Add a signer** – allows you to add a new signer to the session
- 4) **Send for signature** – allows you to send to all signers at once, send in a set automated order (see send email document for further instructions) or send individually.
- 5) **Verified by Velocity** – this will be available after signers have signed. This is your audit trail where you can find timestamps of signatures, acceptance of the electronic signing conditions, identification checks (if you are a LIVEsign user) and session information.
- 6) **Archive session** – this simply moves the entire session into the archive section. You can move sessions back at any point.

7) Edit Signer

Select the pencil icon beside a signer's name to make changes to a signer's name, email, phone number, LIVEsign/SMS option.

VELOCITY E-SIGNATURE PORTAL

Smith Contract Close Session
Session Progress: 0/9

[Edit Session](#) [Add Document](#) [Add Signer](#) [Send For Signature](#) [Verified by Velocity](#) [Archive Session](#)

Signers				
John Smith	johnsmith@velocitysignature.com	broker/manager	0/0	
Jane Smith	janesmith@velocitysignature.com	buyer	0/9	

Documents		
(Ontario) 123 - Waiver (3).pdf	View Document	Remove
(Ontario) 100 - Agreement of Purchase and Sale - Residential (1).pdf	View Document	Remove
(Ontario) 124 - Notice of Fulfillment of Condition (1).pdf	View Document	Remove

[Start LIVEsign Session](#)

8) Remove a document

Select remove beside the document name that you want to delete and follow prompts. *Note you can only remove documents from a session that have not been signed.

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Session Progress: 0/9

[Edit Session](#) [Add Document](#) [Add Signer](#) [Send For Signature](#) [Verified by Velocity](#) [Archive Session](#)

Signers				
John Smith	johnsmith@velocitysignature.com	broker/manager	0/0	
Jane Smith	janesmith@velocitysignature.com	buyer	0/9	

Documents		
(Ontario) 123 - Waiver (3).pdf	View Document	Remove
(Ontario) 100 - Agreement of Purchase and Sale - Residential (1).pdf	View Document	Remove
(Ontario) 124 - Notice of Fulfillment of Condition (1).pdf	View Document	Remove

[Start LIVEsign Session](#)

9) View document

You can view any document during the signing process and see its current progress here. Once you select view document you can choose to download it or print it.

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Session Progress: 0/9

Edit Session Add Document Add Signer Send For Signature Verified by Velocity Archive Session

Signers				
John Smith	johnsmith@velocitysignature.com	broker/manager	0/0	
Jane Smith	janesmith@velocitysignature.com	buyer	0/9	

Documents		
(Ontario) 123 - Waiver (3).pdf	View Document	
(Ontario) 100 - Agreement of Purchase and Sale - Residential (1).pdf	View Document	
(Ontario) 124 - Notice of Fulfillment of Condition (1).pdf	View Document	Remove

Start LIVEsign Session

10) To start a LIVEsign session select Start LIVEsign button (For LIVEsign subscribers only)

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Session Progress: 0/9

Edit Session Add Document Add Signer Send For Signature Verified by Velocity Archive Session

Signers				
John Smith	johnsmith@velocitysignature.com	broker/manager	0/0	
Jane Smith	janesmith@velocitysignature.com	buyer	0/9	

Documents		
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Start LIVEsign Session