

## Tech Tip #22: ProDOC Package Manager eSign Envelope Options Explained

Sending packages for eSign from ProDOC Package Manager is quick and easy! Once a package has been created and all forms within a package are ready for eSign, highlight the package and select the **eSign** button at the top of Package Manager. This will open the eSign Envelope Options dialog.

**Package Manager**

QUICK FILTERS

Created By:

New Close Out Delete eSign Cancel eSign

STATUS NAME TYPE PRODUCT

**eSign Envelope Options** Save | Cancel

eSign Additional Text :

Add Before Default Text  
 Add After Default Text

eSign Form Order :

Expense Report  
Expense Preapproval  
expensestest

Up Down

Signing Order groups :

Signer Role	Signer Name	Signer Group
eDOC Signer	Karl Testing	2
Customer Signer	Karl eDOC Test	1

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**eSign Additional Text** – The email message sent to each signer includes default text but a personalized message can be added before or after the default text.

- Add your personalized message and click the radio box to choose where the message will appear.

**eSign Form Order** – The order a member will receive and view documents in a package.

- Choose the order the forms will be viewed by selecting the form and moving it with the up or down arrows.

**Signing Order Groups** – The order signers will receive and sign the documents; i.e., signer 1 needs to sign the documents before signer 2 receives the package for their signature.

- Click on the plus and minus signs in the Signing Order groups to order which signer will receive the package and sign the documents before the next signer will receive the package for their signature. In the example above, the customer, signer 1, will need to sign the documents before signer 2 is notified there are documents to sign. When signer 2 is sent the documents to sign, signer 1's signature will be visible on the documents.

Click **Save** when finished.

These options also are available in eDOCSignature.