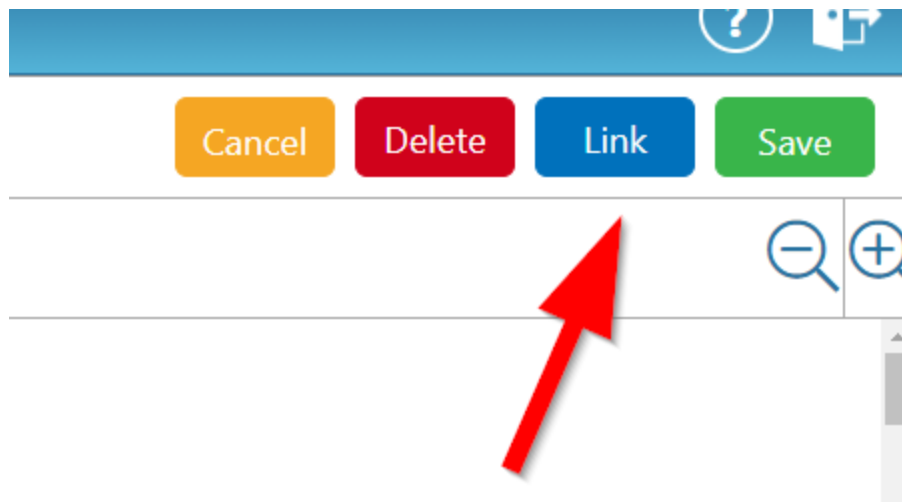















Tech Tip #68 – eDOCSignature Template Link

*****These settings and features may not be available for all clients. If you do not see them, please contact your solution provider.*****

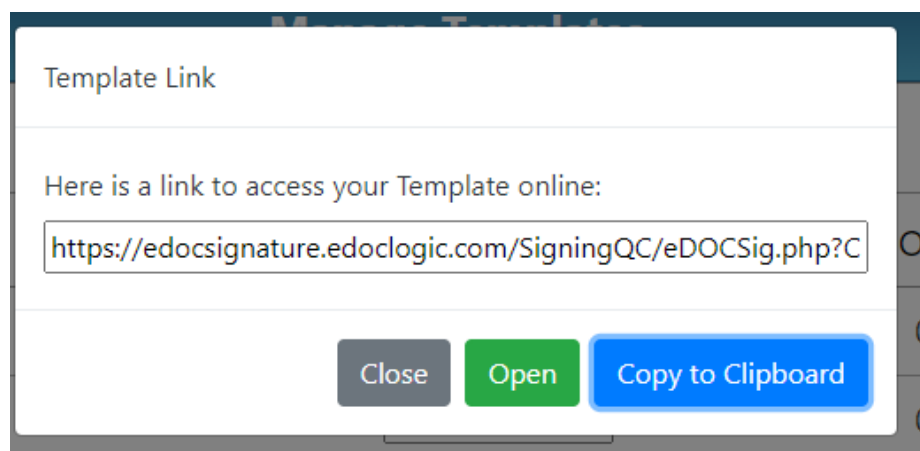
A template created in eDOCSignature automatically generates a URL (i.e. "link"). When a signer visits this link, an eSign document is created for the template, and the signer can initiate the signing process and complete the document. This feature is also referred to as a *self-service form*. The link for a given template can be found in the top-right corner of the screen while editing the template.



It can now also be found on the Manage Templates screen. From the main menu of eDOCSignature, simply click on **Set Up Templates**. On the far right-hand side of the screen, you will find the template link icon.

Manage Templates			
		Add	Search
Owner	Created On	Type	
RSULLIVAN@	02/25/2021	Reference	  
RSULLIVAN@	02/02/2021	Requested	  
RSULLIVAN@	12/23/2020	Signing	    

Clicking the template link icon opens a window displaying the template's URL. From here, you can copy and paste the URL into an internet browser to initiate the signing process. You can also embed the URL into your email, website, or anywhere your members may have access to create a *self-service form*.



Notes:

- The URL does not change even if the template is modified at a later time. Sending the same URL to several members will allow each member to generate and sign their own unique document.
- Once a document is completed, a notification email will be sent to the email listed in the Notification Email field.
- The signed document is also automatically saved under the template owner's username which defaults to whomever created the template. A template's owner can be managed using the Owner drop-down list on the Manage Templates screen.