



## Tech Tip #48: Radio Buttons vs. Check Boxes in eDOCSignature

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

When setting up either a document or template, the **Radio Button** can be found on the tool bar just to the *right* of the **Check Box** option.



Check Boxes are ideal for a list of options from which a member can select any number. For example, in the screenshot below, the member may want to select one, a few, or all of the services shown. This makes Check Boxes the ideal option in this scenario.

**I Want These Accounts and These Services**

<input checked="" type="checkbox"/> Savings Account (\$ 10 minimum balance)	<input type="checkbox"/> I Want Direct Deposit
<input checked="" type="checkbox"/> Checking Account (totally free)	<input type="checkbox"/> I want a Debit/Check/ATM Card
<input checked="" type="checkbox"/> Debit Account	<input type="checkbox"/> I want Online Banking & eStatements
<input type="checkbox"/> Certificate of Deposit	<input checked="" type="checkbox"/> I don't want Overdraft Protection
<input type="checkbox"/> Individual Retirement Account (IRA)	<input type="checkbox"/> I don't want Courtesy Pay
<input checked="" type="checkbox"/> Money Market	<input type="checkbox"/> I want eDeposit
<input type="checkbox"/> Vaction Club	<input type="checkbox"/> I want Paper Statements
<input type="checkbox"/> Holiday Club	

**Radio Buttons** offer more customization and are ideal for questions that *cannot* have more than one option selected. In the example below, the member is asked if they are interested in a loan protection plan. The member can either select yes or no, but they cannot select both. This is a perfect time to use **Radio Buttons**.

Are you interested in having your loan protected?  YES  NO

will disclose the cost to protect your loan. The protection is voluntary and does not affect your loan approval. In will need to sign a separate application that explains the terms and conditions.

**Guarantors** Complete **OTHER** section below.

You will need to create two Radio Buttons. Begin by clicking the Radio Button option on the tool bar. If you are creating a template, you will see a new window appear with options to set up the field. If you are sending a document out for eSign you will need to double-click on the small Radio Box field that is populated on the top-left of the screen to bring up the same window.

On the new window, there are two important fields that need to be filled in. The first field is **Field Name**. This field needs to be the same for both Radio Buttons being created, as that is how the buttons are linked together. In the example below, the field name being used is "LoanProtection."

***Note: The Field Name cannot have spaces between words. It also cannot contain most special characters.***

The second field is **Selected Value**. This field is what differentiates the two Radio Buttons. In the first Selected Value field, enter **Yes**. If setting up a template, click **Add**. If sending a document for eSign, click **save**.

The second Radio Button being created follows the same steps EXCEPT for the **Selected Value** field. For this radio button, in the Selected Value field, enter **No**. The end result is two Radio Buttons, only one of which can be selected by a member at one time.

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Role: Applicant

Field Name: LoanProtection

Selected Value: Yes

Mark Type: X

Selected by default:

Required:

Field enabled when:  
Always

Cancel Add

Are you interested in having your loan protected?  YES  NO

disclose the cost to protect your loan. The protection is voluntary and does not affect yo  
need to sign a separate application that explains the terms and conditions.

**Guarantors** Complete **OTHER** section below.