



How To Use DocuSign and Kim Auto-Sign

Kim Document offers two distinct methods of electronic signing: DocuSign and Kim Auto-Sign. Both methods need to be managed per application as per the instructions below.

DocuSign

Configuring DocuSign Tags

You can integrate the tags you want to use directly in your applications. You can use multiple tags for each type and use a variable {r} to handle multiple recipients.

Signature - /sn{r}/
Initial - /in{r}/
Full Name- /fn{r}/
First Name- /fn{r}/
Last Name- /ln{r}/
Date Signed - /ds{r}/



For example, these tags (/sn1/, /fn1/, /ds1/,) are used below to include the customer signature, full name, and signing date.

12. ENTIRE AGREEMENT

This Agreement constitutes the entire agreement between the Parties and supersedes and extinguishes all previous drafts, agreements, arrangements, and understandings between the Parties, whether written or oral, relating to its subject matter.

AGREED by the Parties through their authorised representative:

For and on behalf of /fn1/

Signature: /sn1/

Date: /ds1/



The document can now be used with agreements that will be sent for signature via DocuSign. When the document is opened — and the corresponding tags have been created in DocuSign — the tags will be displayed.



Note

After configuring the tags, you should highlight them one at a time and change their font color to white or to the background color for the document. This ensures the characters used for the tags are not displayed in the generated document.

DocuSign Tag Types

Within Kim Document you can add the following tags to your documents:

- **Signature.** New users first confirm their signing name and initials, and then select a signature style. When they adopt their signature, it is applied to the signing field. Otherwise, the signature is applied with a single click. The signing name will be added when you add the recipient to your document (for further information in see ‘Signing the Document and Adding Recipients’ below).

For instance, in your Application, you may need to have /sn1/, /sn2/, and /sn3/ to account for the 3 recipients of a document.

- **Initial.** Just like signing, new users first adopt a signature, and then their initials are applied to the document.

For instance, in your Application, you may need to have /in1/, /in2/, and /in3/ to account for the 3 recipients of a document.

- **Date Signed.** This field is automatically filled in with the current date. Your account administrator can set the format of the date for all documents sent from your account, in the Signing Settings set for your account.

For instance, in your Application, you may need to have /ds1/, /ds2/, and /ds3/ to account for the 3 recipients of a document.

- **For the Full Name or Name:** The value entered when you send the Document to the recipients.

For instance, in your Application, you may need to have /fln1/, /fln2/, and /fln3/ to account for the 3 recipients of a document.

- **For the First Name,** the first word of the name is used.

For instance, in your Application, you may need to have /fn1/, /fn2/, and /fn3/ to account for the 3 recipients of a document.

- **For the Last Name**, the last word of the name is used. Depending on the format you choose, the field automatically populates with the recipient's name, or portion of the name, as you entered it when you added the recipient in the 'Signing the Document and Adding Recipients' section.

For instance, in your Application, you may need to have /ln1/, /ln2/, and /ln3/ to account for the 3 recipients of a document.

Note

If the recipient changes their name when they adopt their signature, the Name field updates to reflect the new name. Some tags automatically populate with the signer's data, while others require the signer to enter some information or make a choice.

Setting up DocuSign

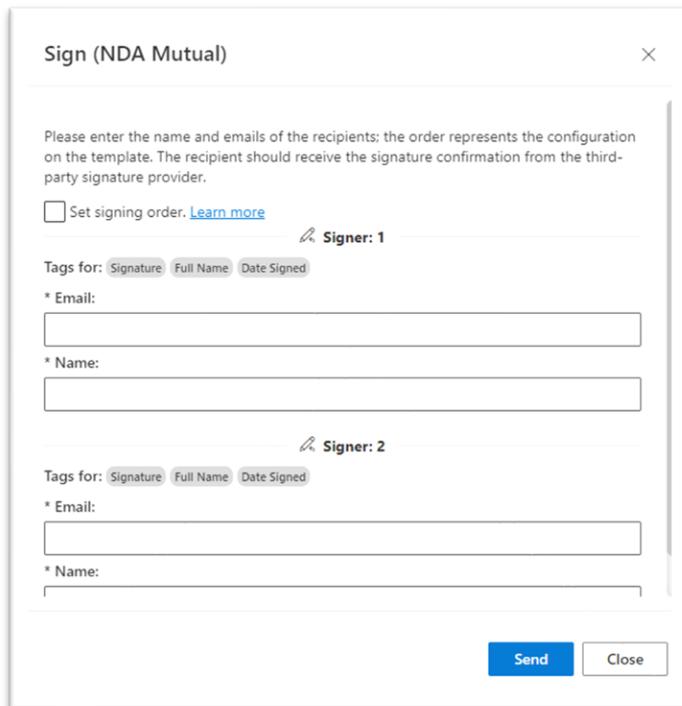
Before enabling the DocuSign signature, you must ensure that the Administrator has set up the DocuSign settings to the KIM Document. Also, you must ensure that your Application has at least one DocuSign Tag.

1. Go to Application settings
2. Check the "Select electronic signature to make sign action available from record menu." checkbox.
3. Select DocuSign in the "Signature provider" list.
4. Update the Application.

The screenshot shows the 'Application Settings (NDA Mutual)' dialog box. On the left, there is a sidebar with 'Settings' selected. The main area is divided into sections: 'Enable Notifications' with a checkbox and descriptive text; a list of events with checkboxes (Document Creation, Document Delete, Document Share, Application Edit, Application Delete(Owner), Application Remove(Co-Owner/Document Creation), Application Share); 'Electronic Signature' with a checked checkbox and descriptive text; and 'Signature Provider' with a dropdown menu set to 'DocuSign'. At the bottom right, there are 'Update' and 'Cancel' buttons.

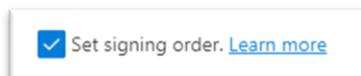
Signing the Document and Adding Recipients in DocuSign

Once you select the Document to sign, you can add the recipients who will receive and sign your documents. You provide an email address and full name for each recipient. Recipients do not need a DocuSign account. Even without an account, they can still open your document and complete their signing action.



Setting a Signing Order in DocuSign

If your Application has configured more than one recipient (for further information see the 'DocuSign Tag Types' above), you can choose to enable a signing order. The signing order lets you control the order in which your recipients receive and sign your documents.



With Set signing order enabled, the recipient routing will take the order of the tags configured in the Application. Each recipient receives the email notification once the previous recipient has completed their action. You can also have a mix of sequential and parallel routing.

When you use a signing order, you can route a signing request to the same person multiple times.

For example, you want to send a purchase order to your manager to approve, then send it on to purchasing to sign, and finally, send a copy to your manager again.



With Set signing order disabled, all recipients receive the document in parallel. Once you finish adding recipients, you are ready to send your Signing request.

DocuSign Signing Process

To view a short video which demonstrates the signing experience that every recipient will have, please click on the link below.

[DocuSign eSignature: How To Sign a Document](#)

Kim Auto-Sign

Instructions Coming Soon