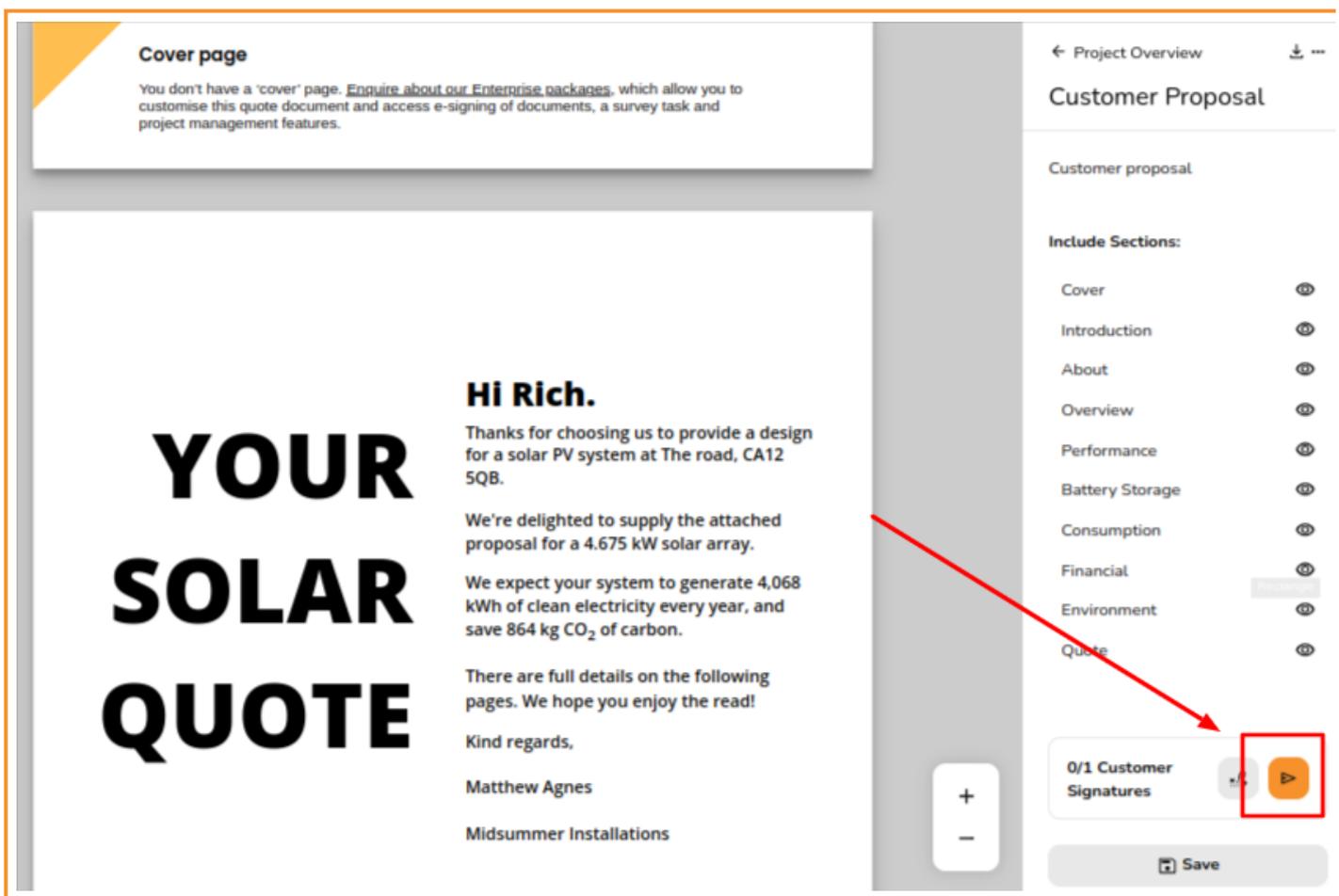


E-signing

The e-signing functionality makes it quick and easy to get important documents signed by your team or customer. Several reports have e-signing capabilities including the customer proposal, G98, G99 A1-1, G99 A1-2, and PV Array Test.

Send a document for e-signing by email

Navigate to the report you want to send for signing via the Reports drop-down in the main site navigation. **Click the send for signing button** outlined in red in the screenshot above. This will open the send-for-signing modal. You can edit the email as you'd like and then **click Send**. The recipient will receive the email which will include a link for them to review and sign the document.



The screenshot shows a document viewer interface. On the left, a document page is displayed with the following content:

Cover page
You don't have a 'cover' page. [Enquire about our Enterprise packages](#), which allow you to customise this quote document and access e-signing of documents, a survey task and project management features.

YOUR SOLAR QUOTE

Hi Rich.
Thanks for choosing us to provide a design for a solar PV system at The road, CA12 5QB.
We're delighted to supply the attached proposal for a 4.675 kW solar array.
We expect your system to generate 4,068 kWh of clean electricity every year, and save 864 kg CO₂ of carbon.
There are full details on the following pages. We hope you enjoy the read!
Kind regards,
Matthew Agnes
Midsummer Installations

On the right, a sidebar titled 'Customer Proposal' lists sections: Cover, Introduction, About, Overview, Performance, Battery Storage, Consumption, Financial, Environment, and Quote. At the bottom of the sidebar, a button labeled '0/1 Customer Signatures' with a right-pointing arrow is highlighted with a red box and a red arrow pointing to it from the left. Below this button is a 'Save' button.

Signing a document

When viewing a document that requires e-signing, the customer (or your team members) can **click the signature field** and then enter their name, the date, and their signature. They must tick the box to indicate they agree to the contents of the document.

After the document is signed after being sent via email, the recipient will receive an email with the signed document attached and you will receive an email confirming that the recipient has signed the document.

View a signed document

To view the signed version of the document, **navigate to the document via the reports dropdown** in the main navigation. The signed version of the document can be loaded by selecting the date version you want to view.

Revision #3

Created 19 September 2024 12:51:54 by Cammie Settle

Updated 14 February 2025 16:08:27 by Daisy Kernick