

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 web interface for viewing a solar quote. The main content area displays a 'Cover page' with the text 'YOUR SOLAR QUOTE' and a personalized message from Matthew Agnes at Midsummer Installations. The message includes details about a solar PV system design for 'The road, CA12 5QB', mentioning a 4.675 kW solar array and expected energy generation. A sidebar on the right, titled 'Customer Proposal', lists sections: Cover, Introduction, About, Overview, Performance, Battery Storage, Consumption, Financial, Environment, and Quote. A red arrow points from the 'Send for signing' button (a blue square with a white right-pointing triangle) located at the bottom of the sidebar to the text in the main content area.

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.

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