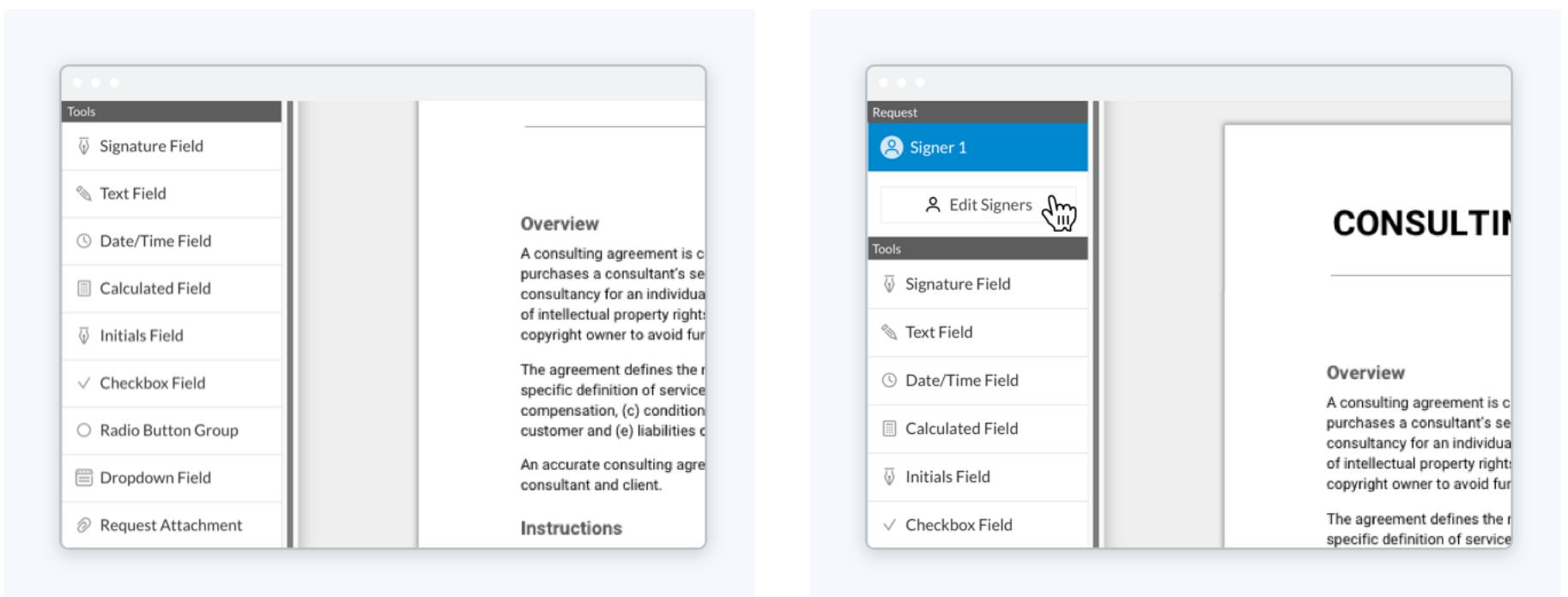


Starter tutorial: How to edit a document

With the signNow web or mobile app (iOS and Android) you can add fillable fields to any document, sign it and send it for signing to one or multiple recipients on any desktop or mobile device. Fillable fields make the signing process quick and easy for your signers, allowing you to get your document approved in seconds.

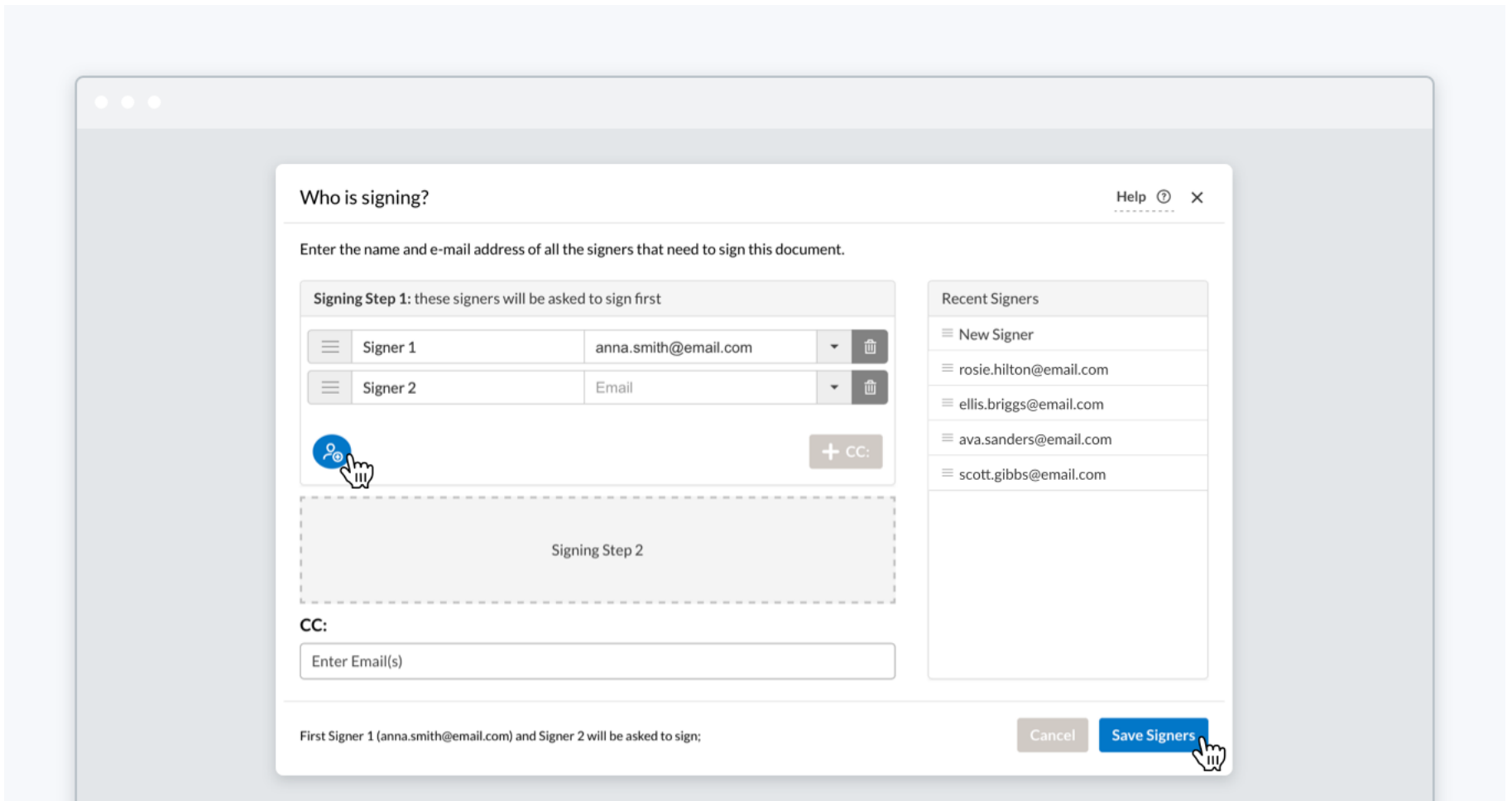
Edit signers, assign roles and add fields

Desktop



Once you open a document in signNow, all fillable fields you can add for signers will be found in the **Tools** section on the left.

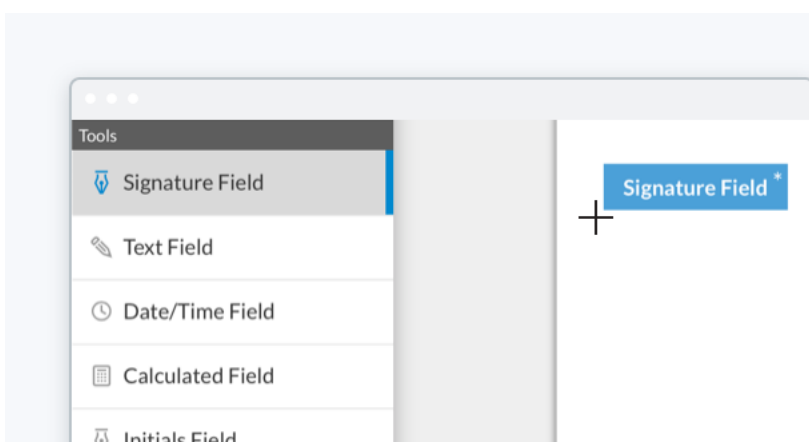
Click **Edit Signers** at the very top of the left-hand menu to add the emails of multiple signers to your document, set the signing order, and enter emails of recipients who will get the finalized copy.



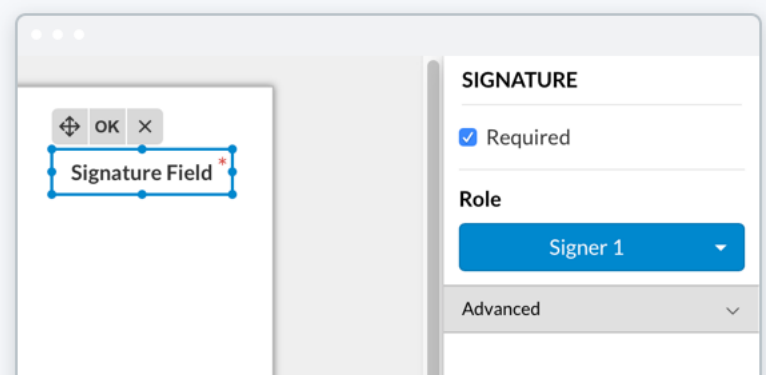
Click on the blue **Add signers** button to add additional signers to your document or drag and drop the emails of your recent signers from the right panel. You can then drag and drop signers to different signing steps.

Once everything is set, click **Save Signers** and proceed to adding fillable fields for each signer.

NOTE: for your convenience, each signer gets their own field color. Signers can only sign and fill out the fields assigned to them. Fields assigned to other signers will become visible only when they have been filled in.

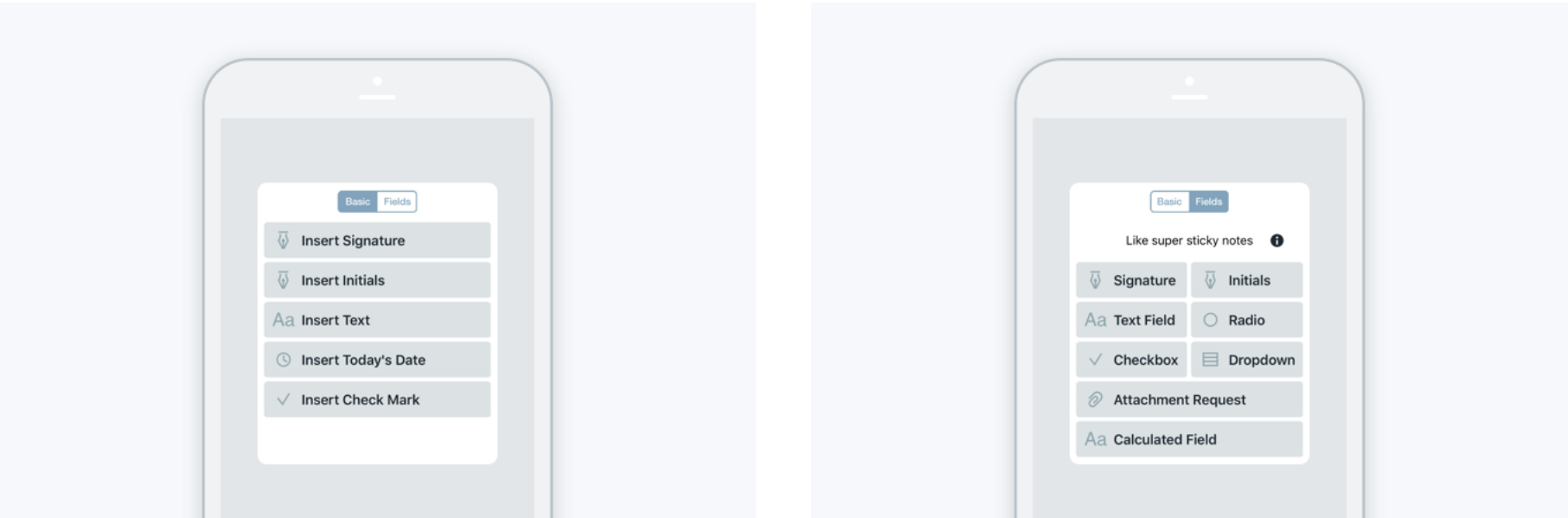


To place fields into a document, simply drag and drop the field from the **Tools** menu to the needed place on the document (or select this field and click anywhere on a document).

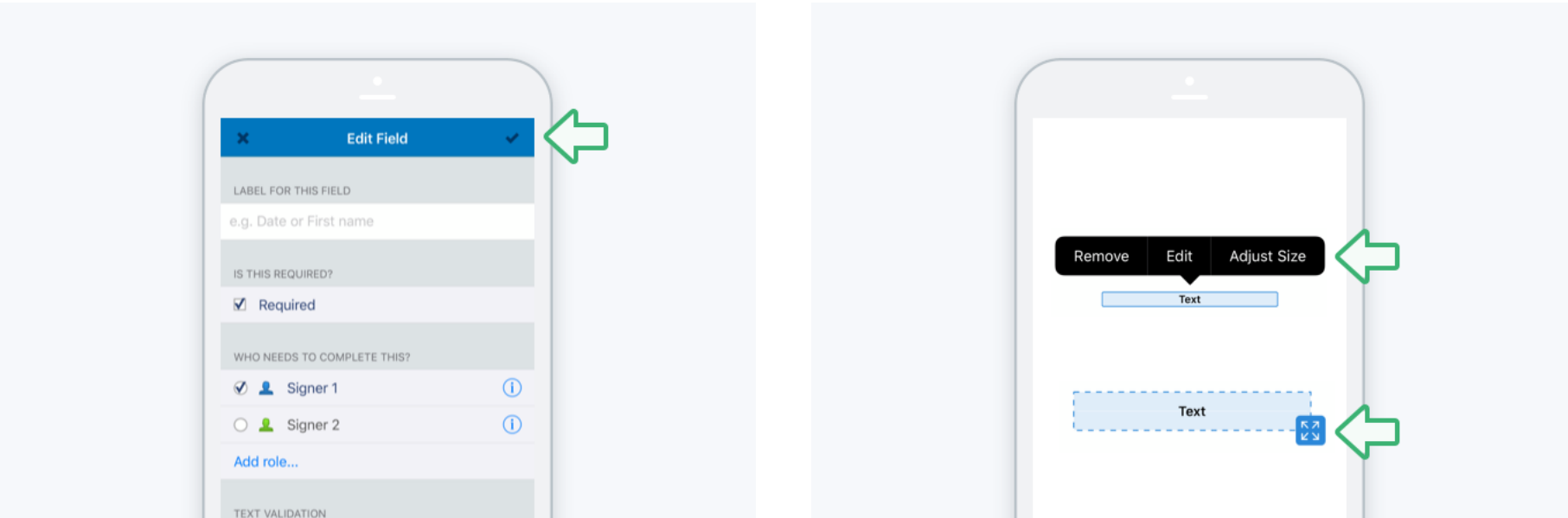


Once you place it, you can easily adjust the size and shape of the field by moving its corners with the cursor, move the field around the document, or delete it. You can also switch the field's options using the panel on the right. To view the panel, add a fillable field on a document and click it.

Mobile



Tap anywhere on a document to open the fillable fields' menu. There you can select **Basic** (you can use these fields to add your signatures and information) and **Fields** (fillable fields you add for recipients).



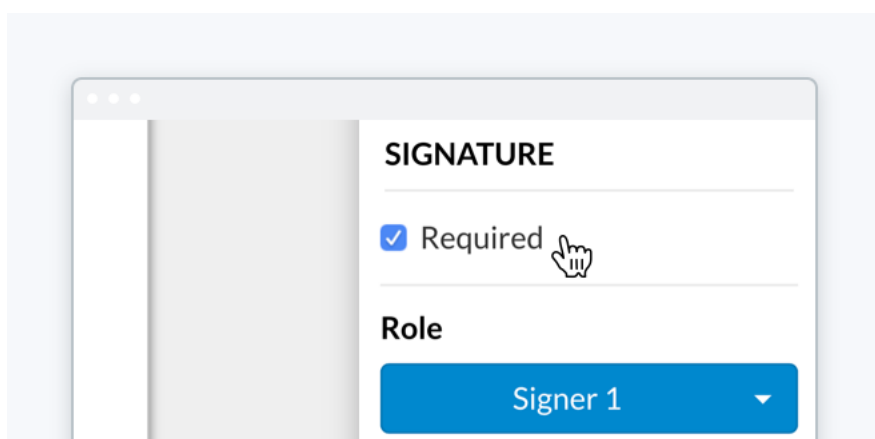
To add a fillable field to a document, first tap it. The **Edit Field** menu will then open, where you can customize the field, assign it to a specific signer, and add or edit roles. Once the field is ready, tap the checkmark in the top right.

To change the field's size, tap it and choose **Adjust Size**. Tap and drag the blue square with the resize arrows to make the field bigger or smaller.

What fillable fields can I add for signers?

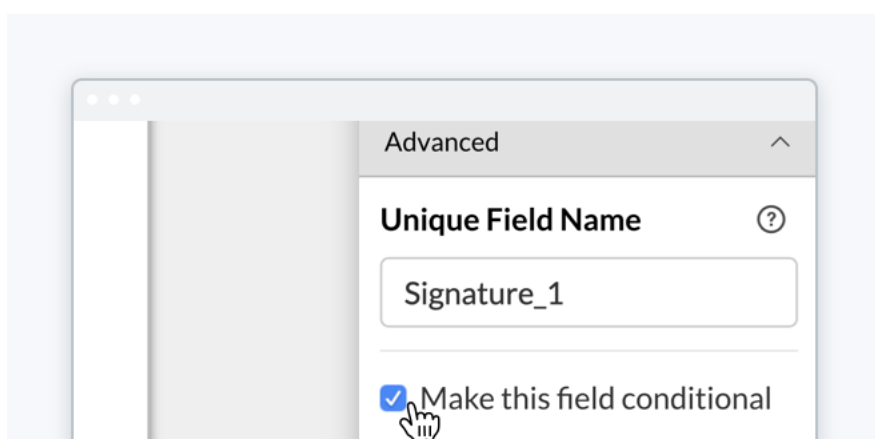
Before adding and customizing fillable fields, let's differentiate between **required** and **conditional** fields.

Required fields



By default, all fillables fields you add in signNow web and mobile apps are set as required, so that signers can't skip them and you get all needed information. To make the field optional, uncheck the **Required** box.

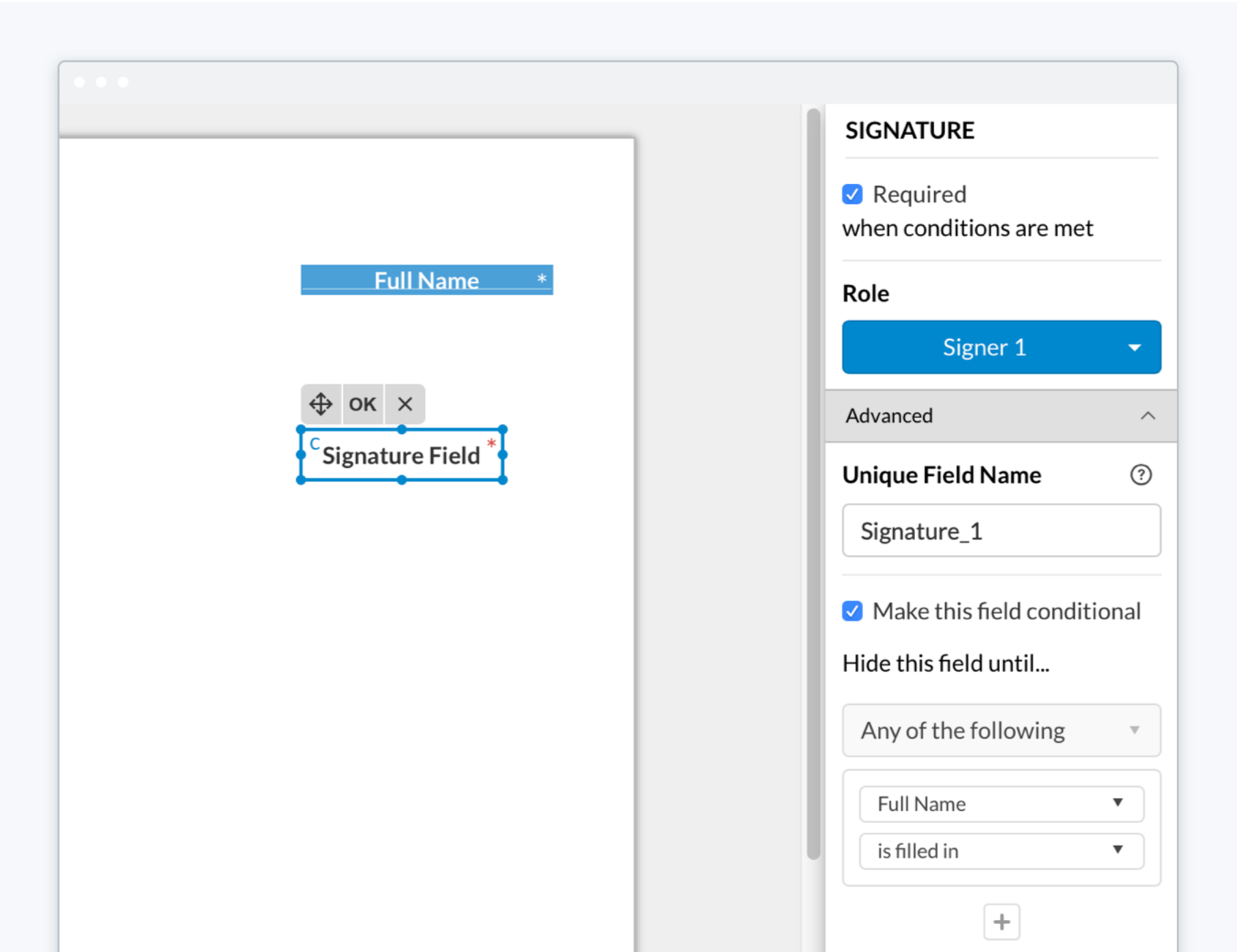
Conditional fields



With signNow, you can predefine how a document will appear for each signer by making fillable fields conditional. **Conditional fields** become visible and can be filled in only when the other field, pre-conditioning it, is already filled in (or left empty, depending on how you set it). Set conditions for one signer or create a cross-conditional workflow. For example, Signer 2 sees conditional fields only after Signer 1 fills them out.

NOTE: you can only add conditional fields in the signNow web app, but recipients can easily fill out conditional fields in the mobile app as well.

Let's take a simple example:



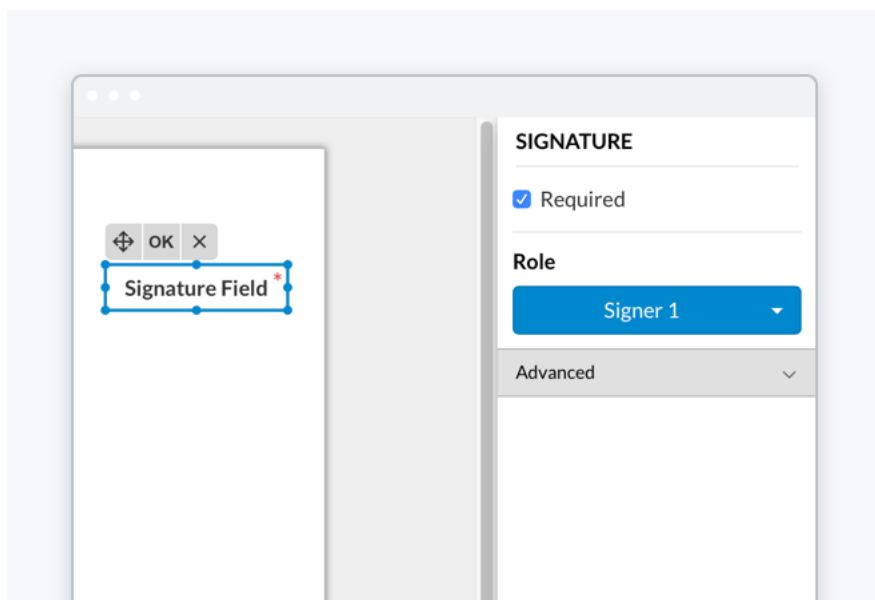
The signer must type in their full name first, and only then can they e-sign a document to finalize it.

The set conditional will appear as follows. Then let's proceed to all the fields you can add and customize for your signers.

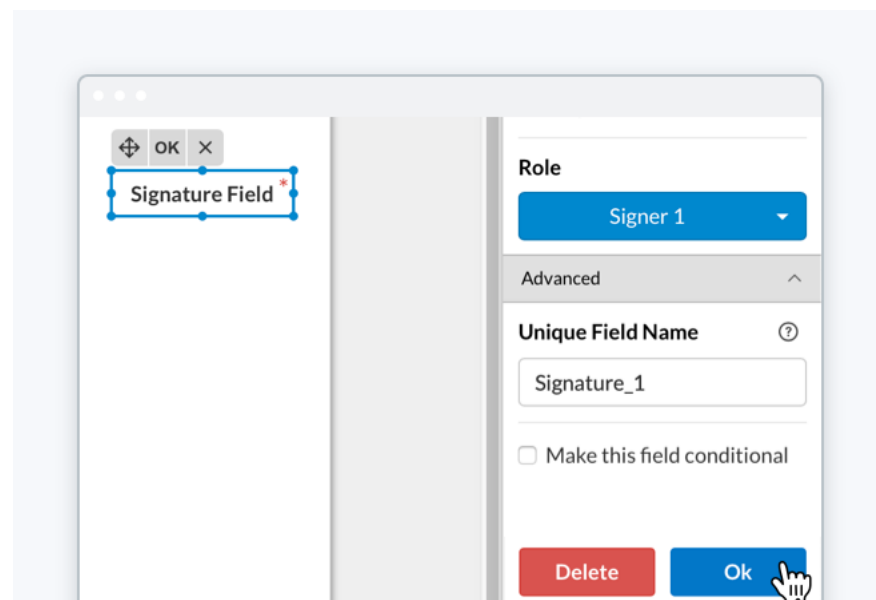
Signature Field

Signature field allows you to collect legally-binding signatures from recipients exactly where you need it on a document.

Desktop

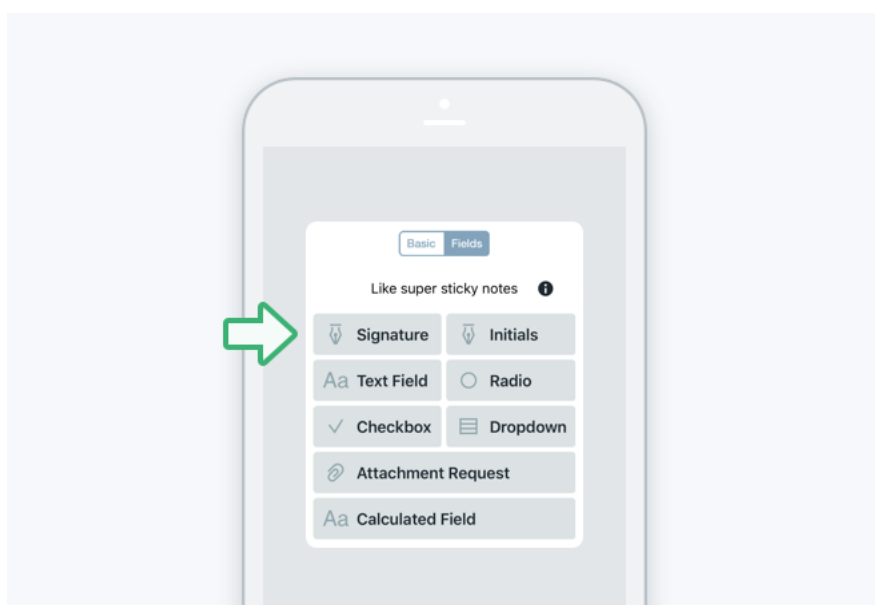


The panel on the right allows you to customize the signature field you add. Here you can uncheck the **Required** mark and assign the signature field to another signer.

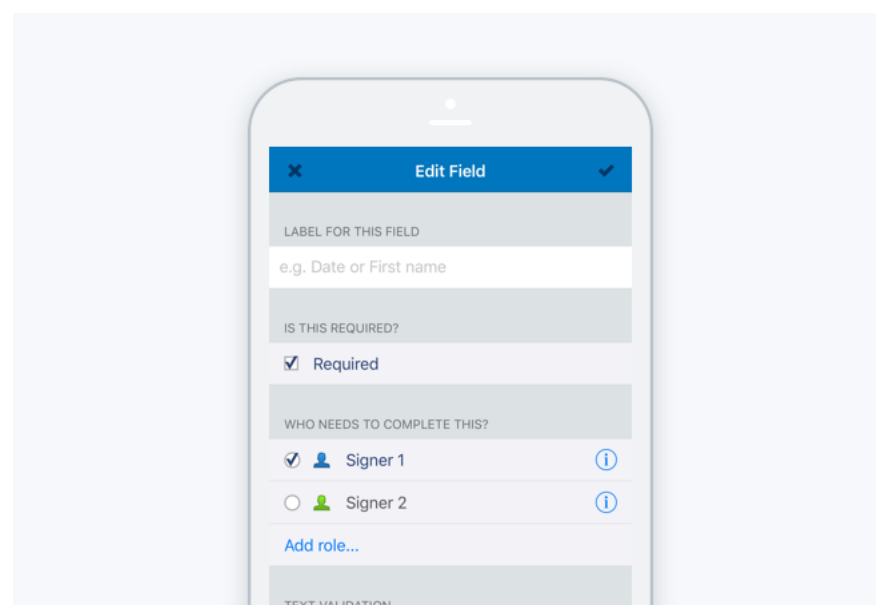


Click **Advanced** to rename your signature field (this comes in handy when dealing with conditional fields and calculated fields) and makes the field conditional (you need at least one more field assigned to this signer to set conditions). When you are done, click **Ok**.

Mobile



Tap **Signature** in the **Fields** section.

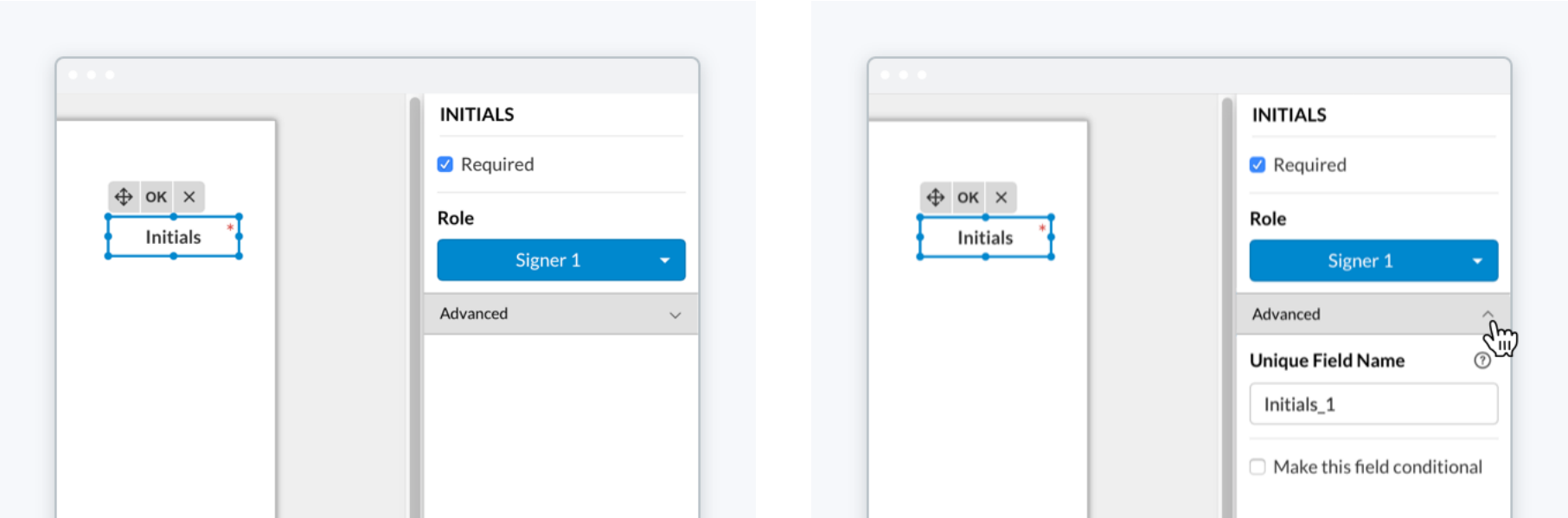


Tap it and customize as you need: make it optional, assign it to a specific signer and enter the unique name.

Initials Field

Initials field allows recipients to quickly add their initials. Initials are useful for approving each page of a legal document, instead or in addition to, a signature.

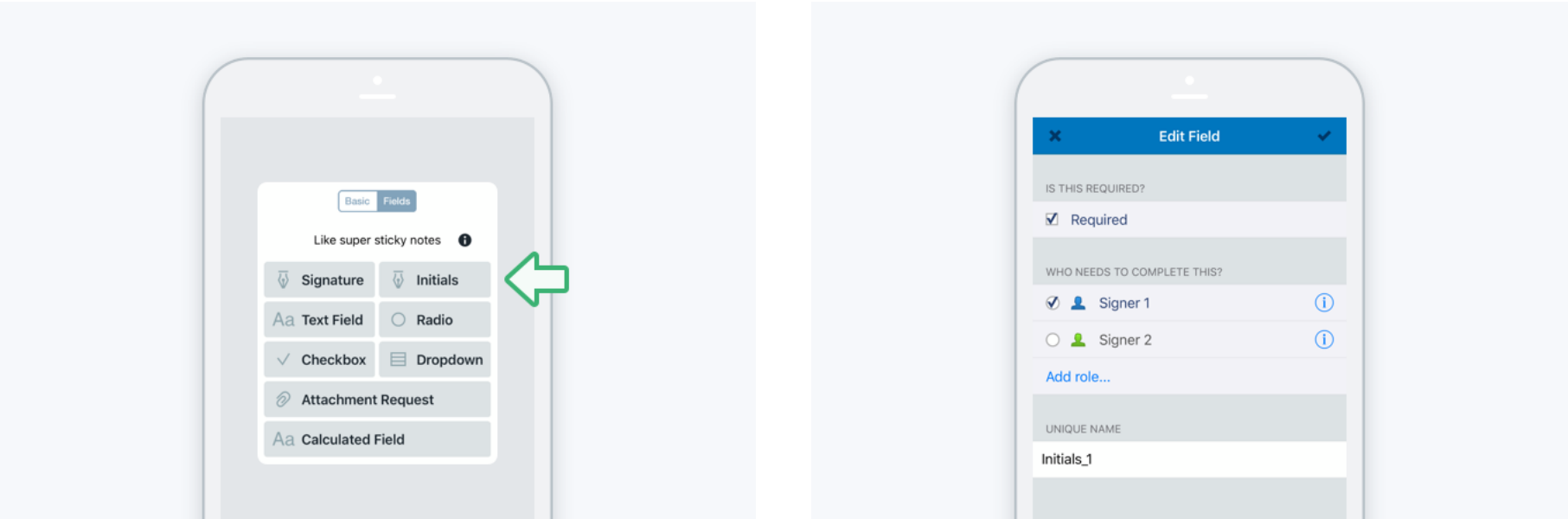
Desktop



Use the right panel to customize the initials field: make it optional, assign the field to another signer.

Click Advanced to rename the initials field or make it conditional.

Mobile



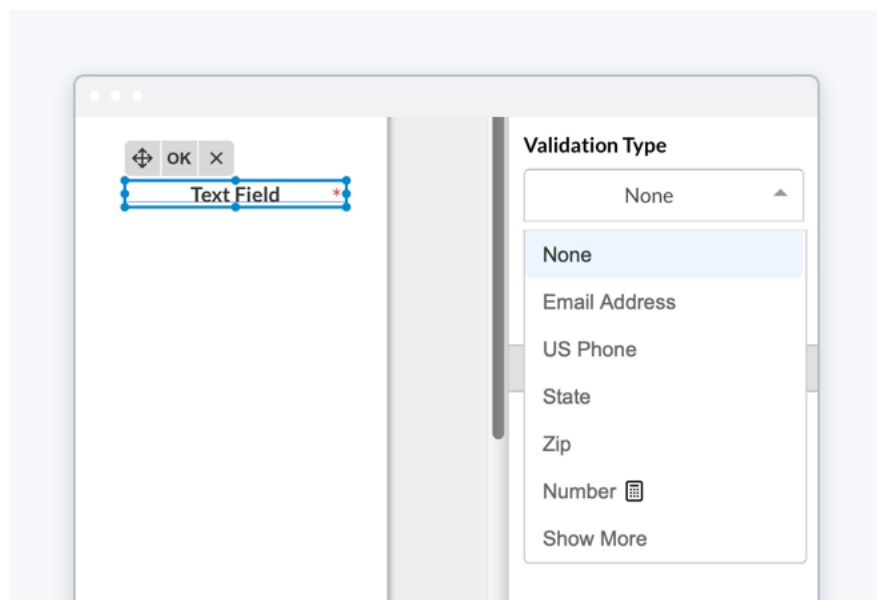
Tap **Initials** in the **Fields** section.

As with the **Signature field**, customize it as you need and add it to a document.

Text Field

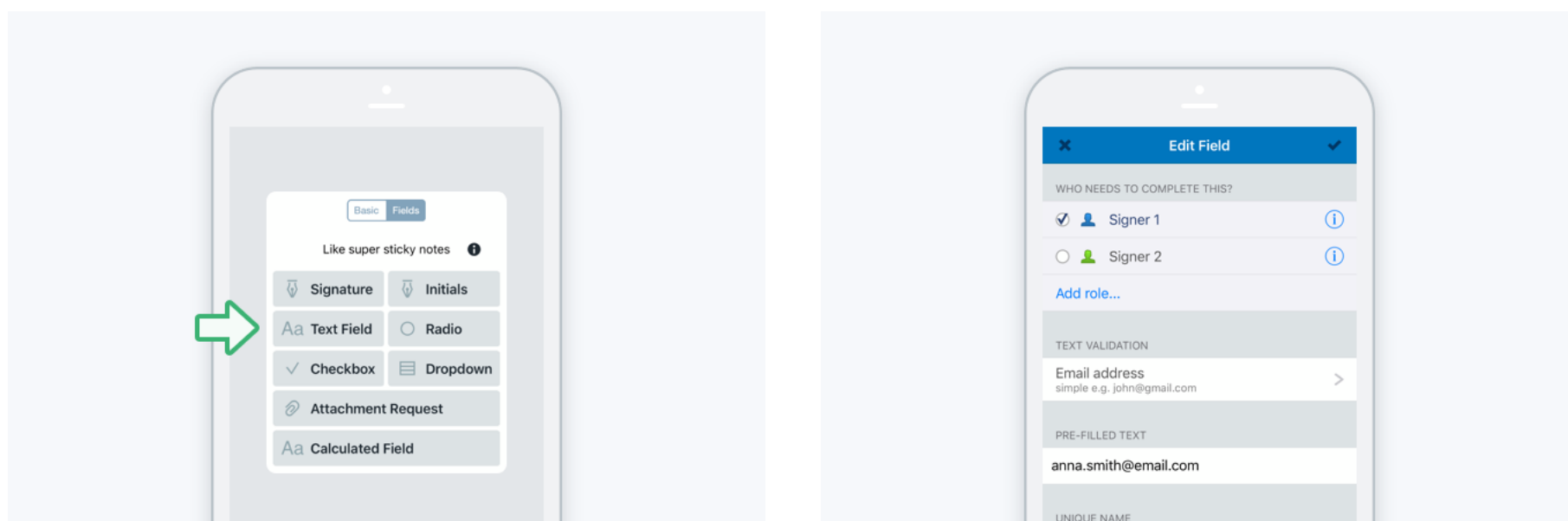
Text field is the easiest way to collect any type of recipient data such as their name, email, phone number, etc.

Desktop



Don't forget to choose a validation type from the dropdown to get the data you need.

Mobile



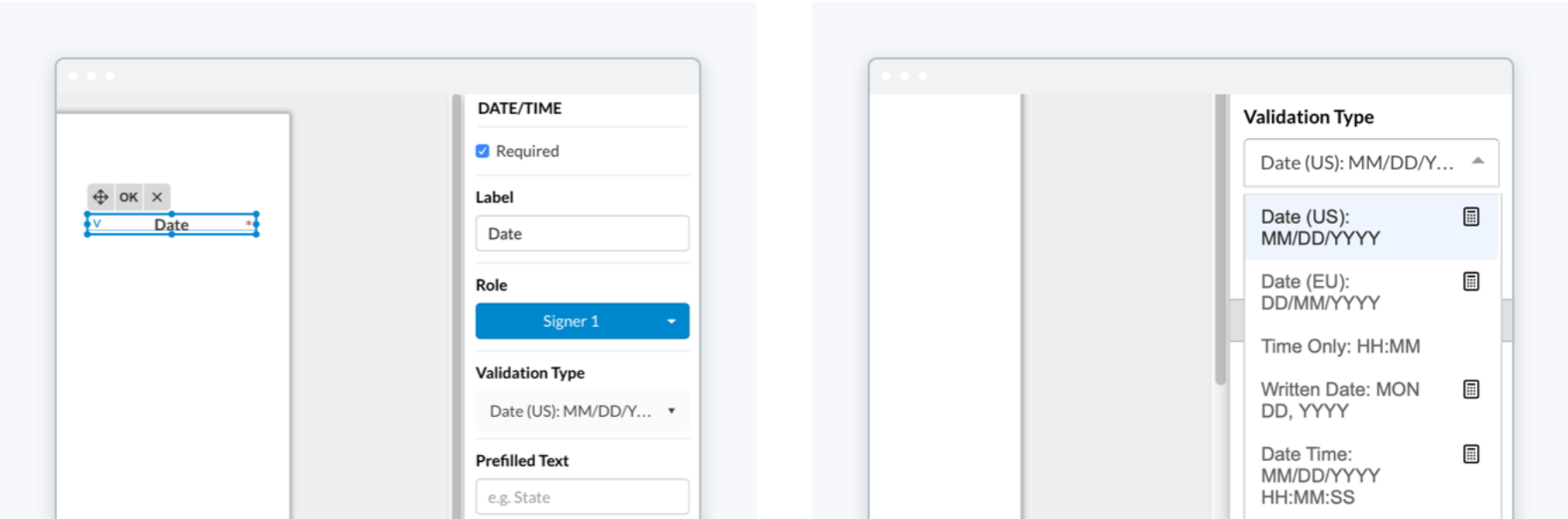
Tap **Text Field** in the **Fields** section. In the **Edit Field** screen you can leave a hint or comment for your recipient in the field's label, choose a field validation to get the information you need (date, number, emails, currency) and prefill the field.

TIP: Text field with DATES&TIMES validation lets your recipients quickly add the date and time of a document's signing.

Data/Time Field

Date/Time field allows your recipient to add today's date and time in a click or choose a date from the calendar.

Desktop



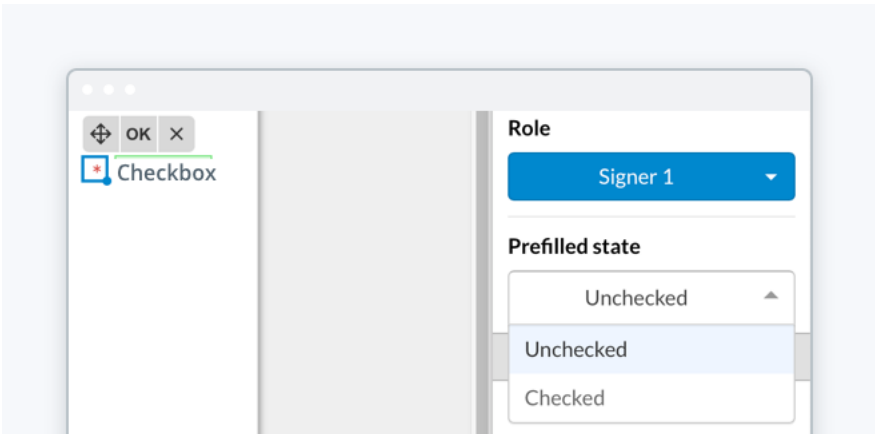
You can make the date/time field optional, leave a hint or comment for your recipient in the field's label or even prefill the field to make the signing process fast and smooth. If you need your recipient to enter a date in a specific format, choose a validation type from the dropdown.

Checkbox Field

Checkbox field allows your recipient to easily select one or several options, cross off tasks in a to-do list, or show that they agree with a statement.

Desktop

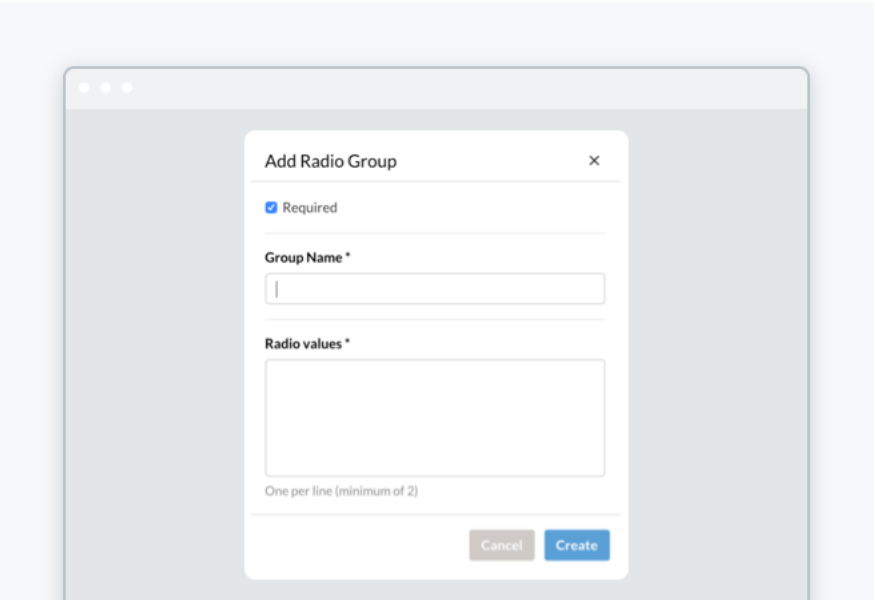
Define how your recipient will see checkboxes: checked or unchecked in the **Prefilled state**.



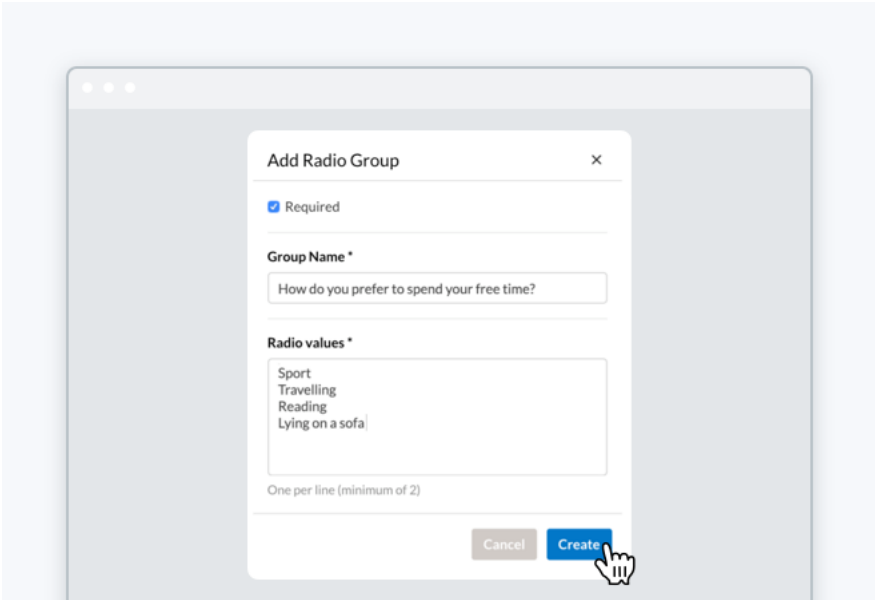
Radio Button Group

Radio button group can also be used in questionnaires and surveys where the respondent has to select a single answer among several.

Desktop

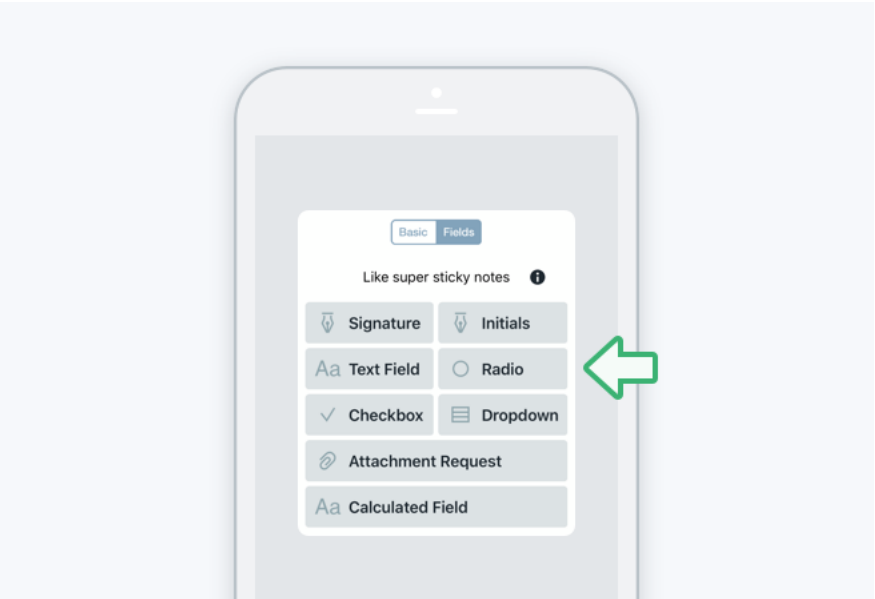


Name your radio button group and enter options (at least two) to add it to your document.

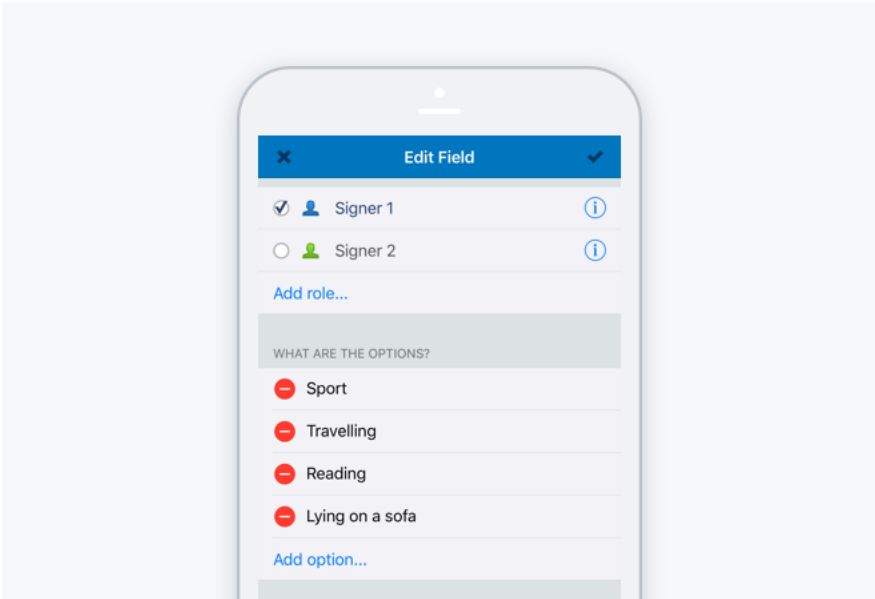


Once you click **Create**, the group will be added.

Mobile



Tap **Radio** and customize the field as usual.

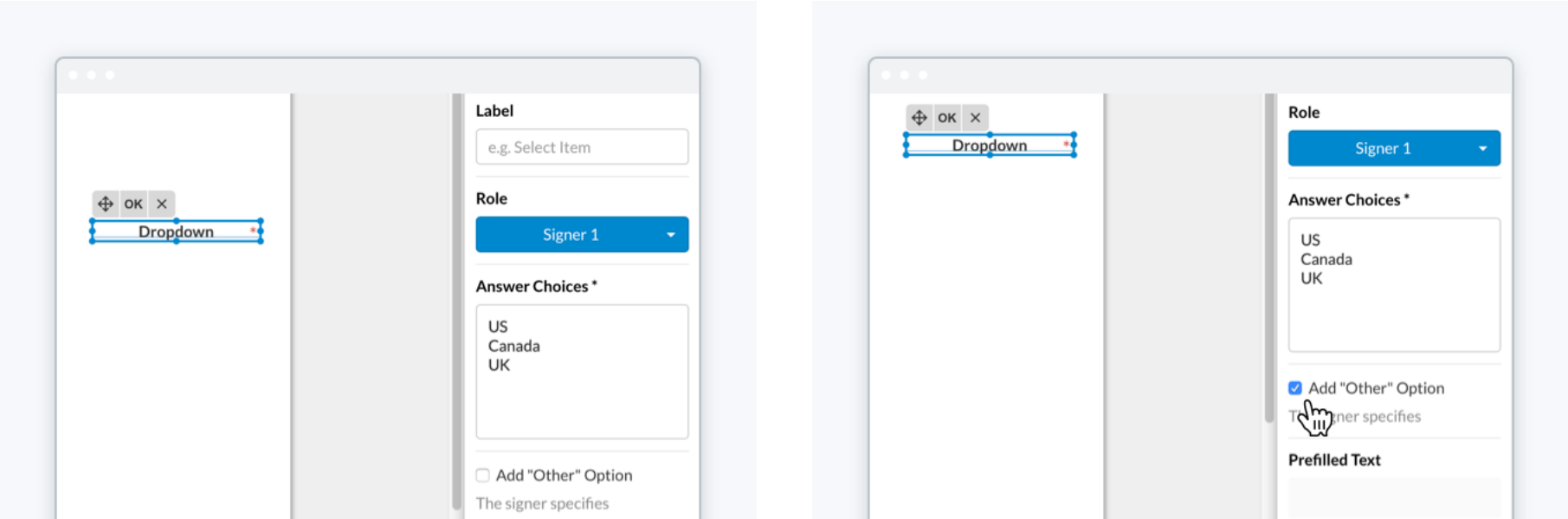


Enter your options in the **What are the options section?** Add as many variants as you need using the **Add option**. To remove an option tap the red circle and then **Delete**.

Dropdown Field

Dropdown field is great for presenting a long list of options and making the signing process smooth and fast. A dropdown list makes it easy for your recipient to choose one predefined variant.

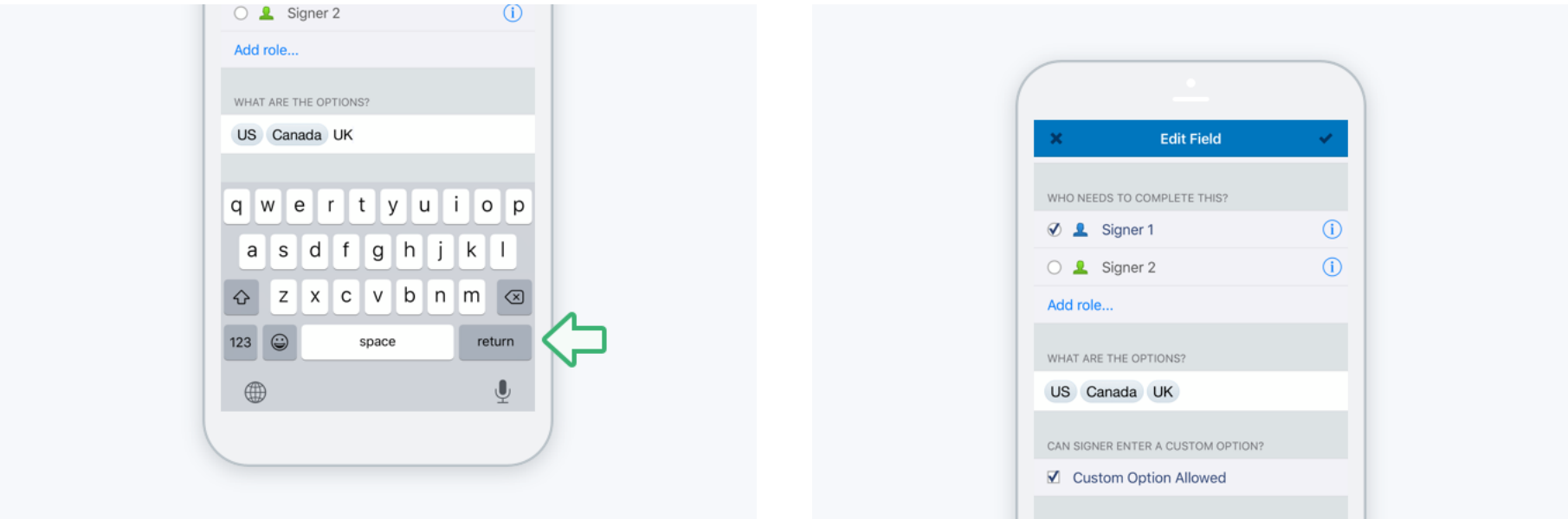
Desktop



Use the panel on the right to customize your dropdown list: enter the list name in the label and add your answer choices.

You can also allow recipients to add their variant by checking **Add “Other” Option**.

Mobile



Tap **Dropdown** in the **Fields**. Enter variants in the **What are the options?** section. Tap **Return** to separate your variants.

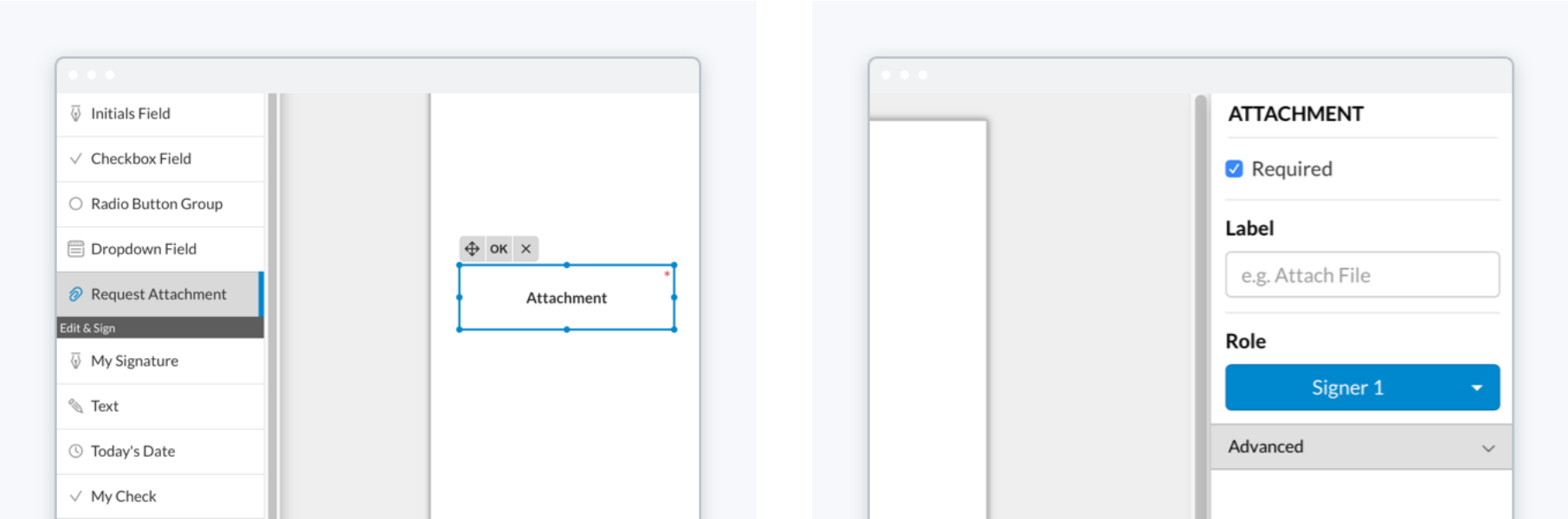
Check **Custom Option Allowed** to let your recipient enter their own variant.

Request Attachment Field

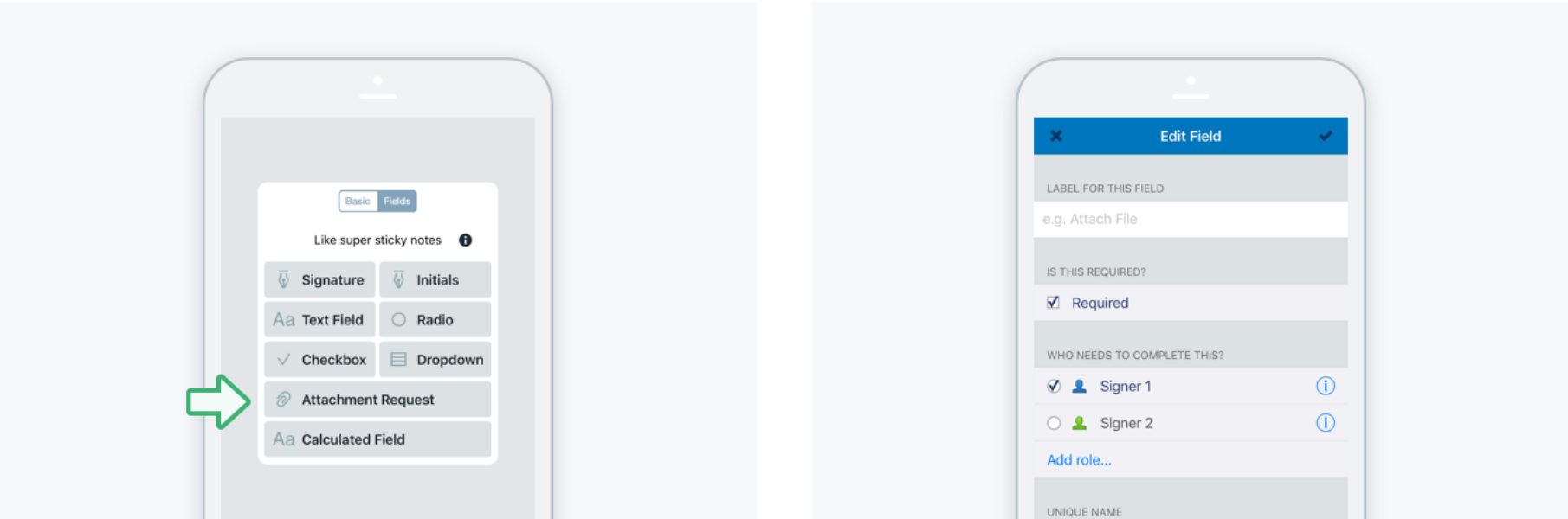
Request attachment field to get a complete document package by sending a single document. A signer can only submit your document when they've uploaded all the files you've required.

Note that the attachment can't exceed 15Mb.

Desktop



Mobile

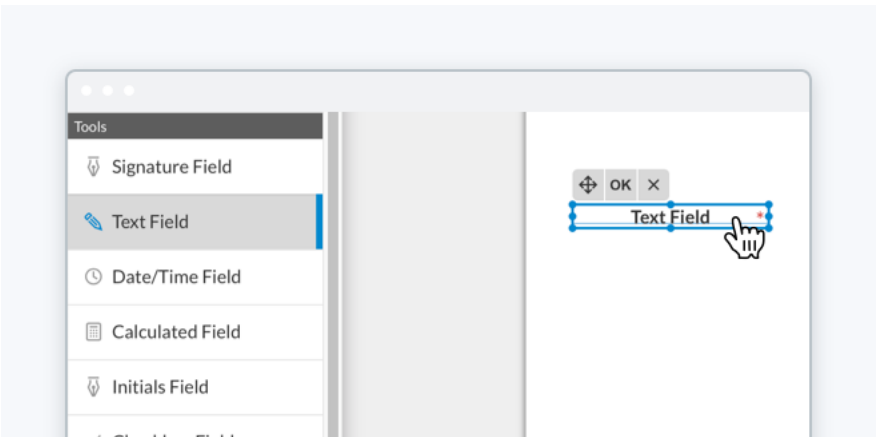


Calculated Field

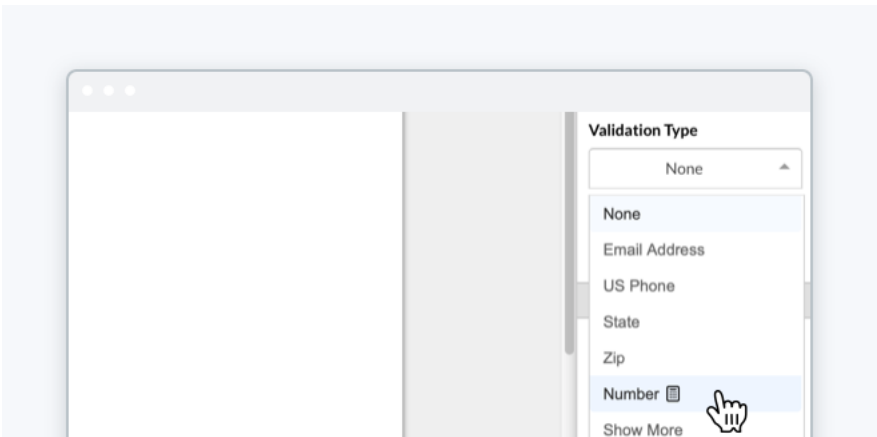
Calculated field helps you automatically calculate values in text and dropdown fields to make dealing with invoices, purchase orders or agreements error free. Calculations include addition, subtraction, multiplication, division and parentheses.

How to set up Calculated fields

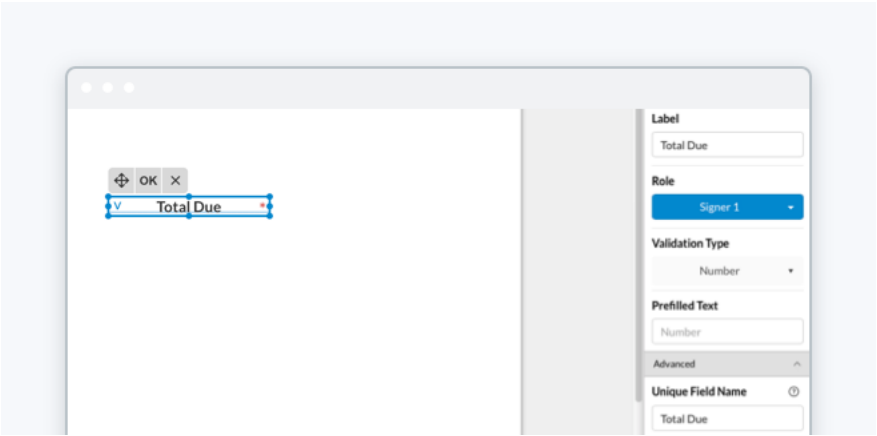
Desktop



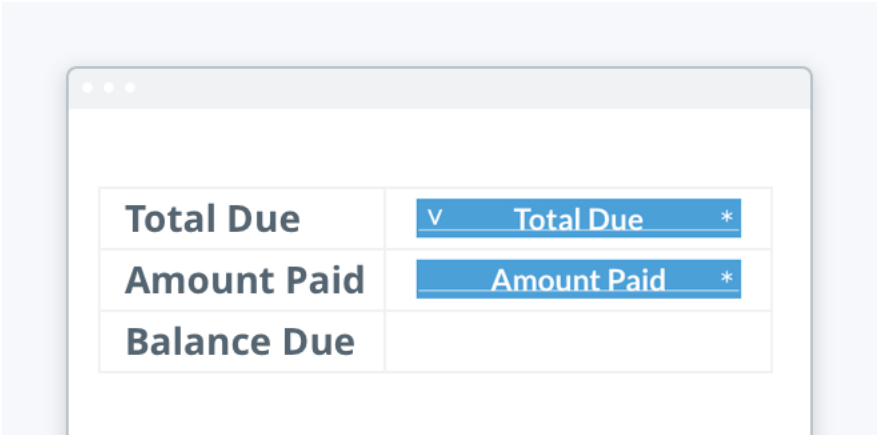
Add text fields or dropdown fields anywhere on a document.



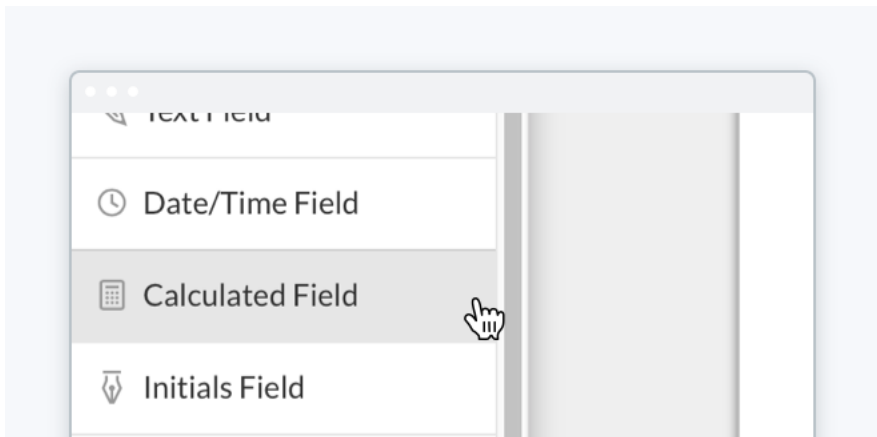
Click **Validation Type** and specify the format of the field (choose only specific field validators which are marked with a calculator).



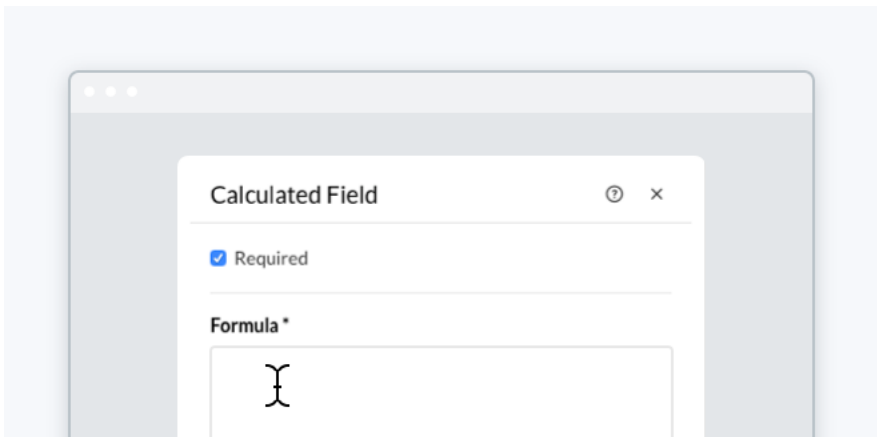
Enter a short description in **Label** and fill in the **Unique Field Name** that will be used in the formula. The text in **Label** and in **Unique Field Name** may be identical.



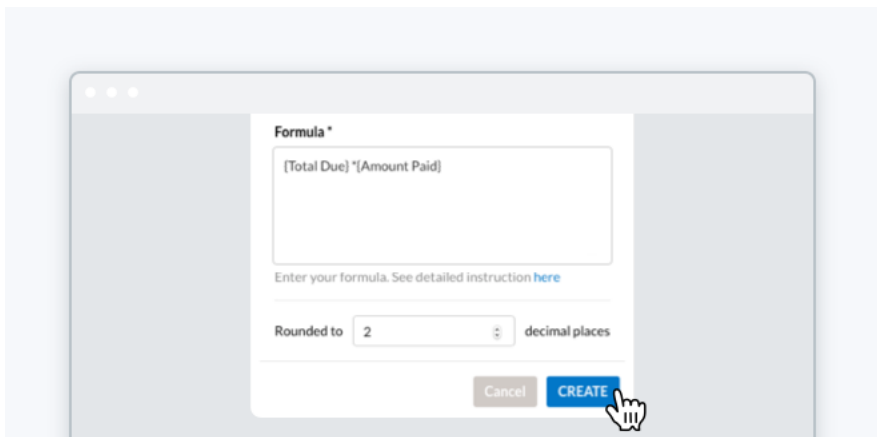
Customize all text and dropdown fields with values.



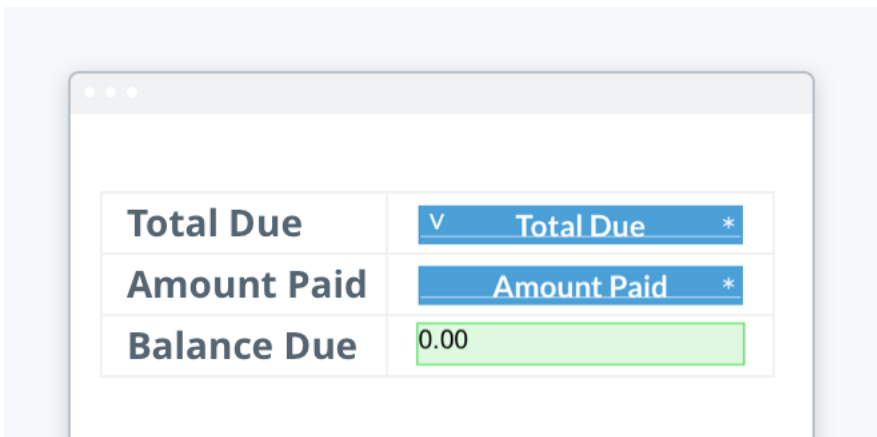
Add a **Calculated field** where you need the formula result.



Enter the formula in the pop up window. The formula may contain unique field names in curly brackets and numbers without brackets. You can also round the value of the field to a specific amount of decimal places.

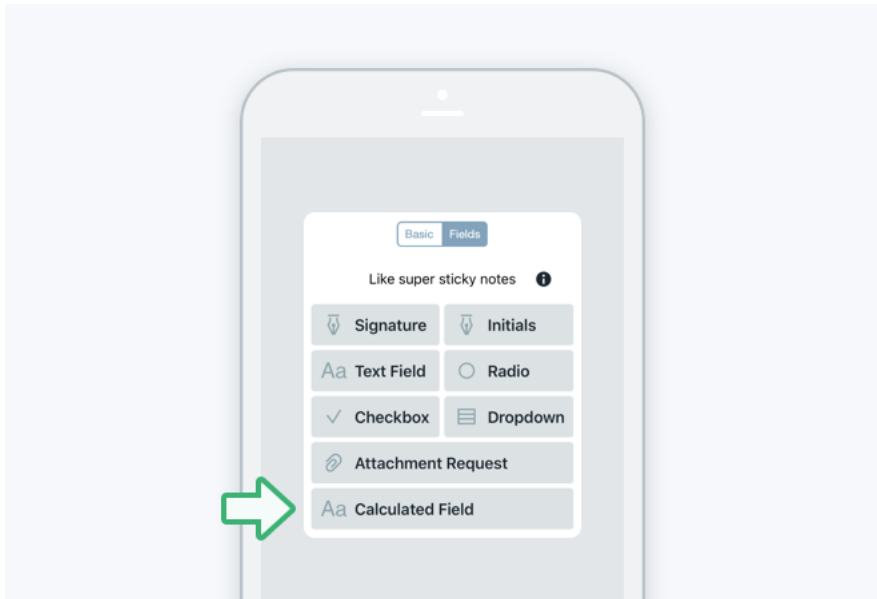


Once you click **Create**, you can set up your calculated field from the right panel.

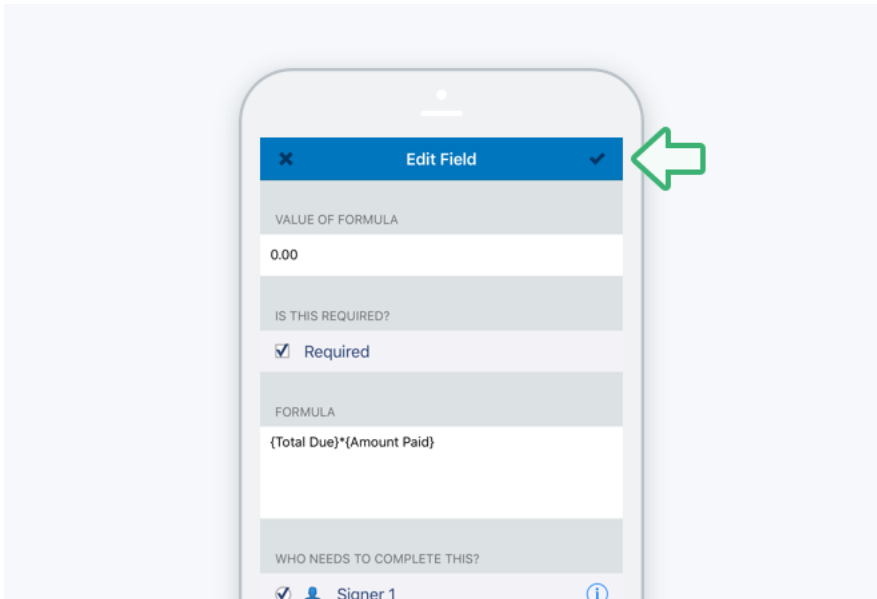


After, a recipient will fill in all required fields and the result will automatically appear in the calculated field you've added.

Mobile



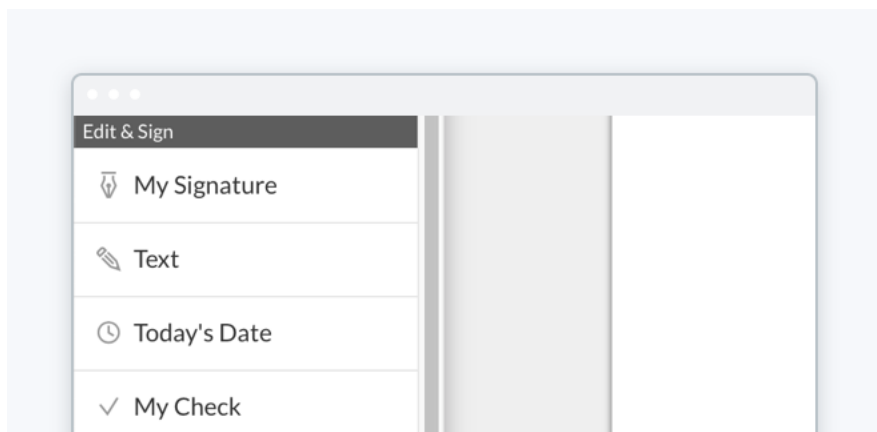
Tap **Calculated Field** in the **Fields** section.



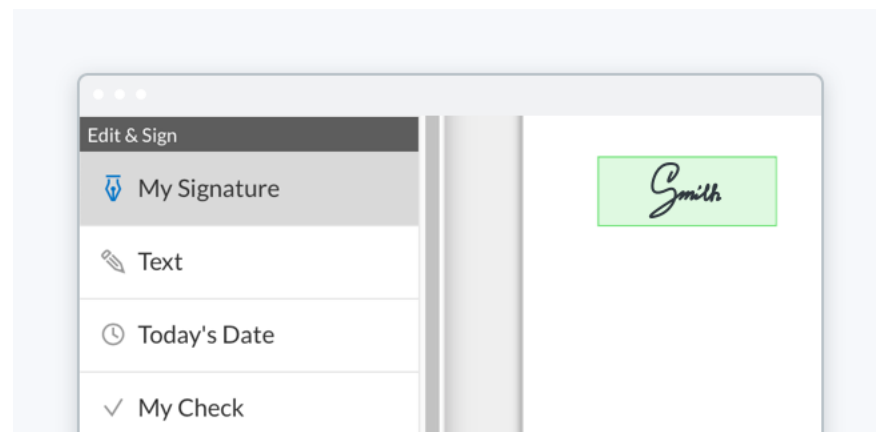
Enter the formula in the **Formula** section and tap the checkmark on the top right.

How can I sign and edit a document?

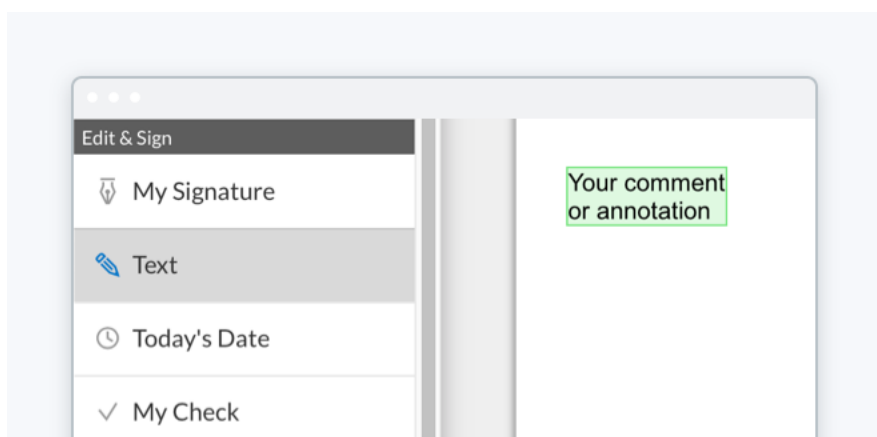
Desktop



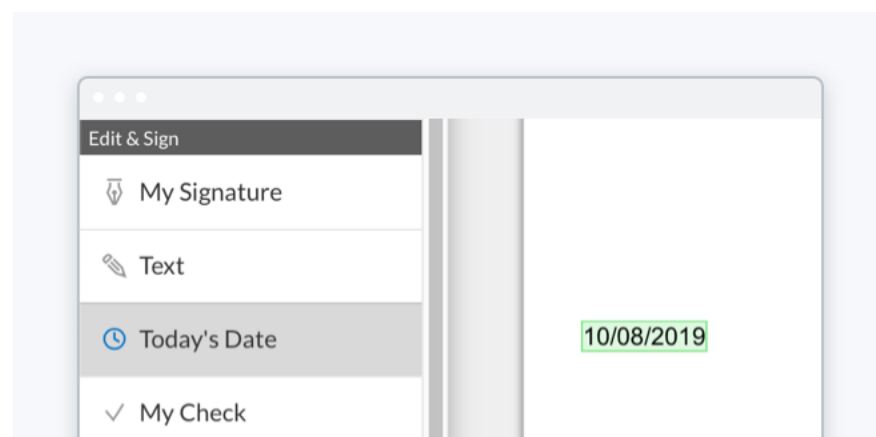
Use the **Edit&Sign** section on the left to add your signature, text, date and checkmarks to a document before sending it for signing. Just as with fillable fields for signers, drag and drop the field you need or select it and click anywhere on your document.



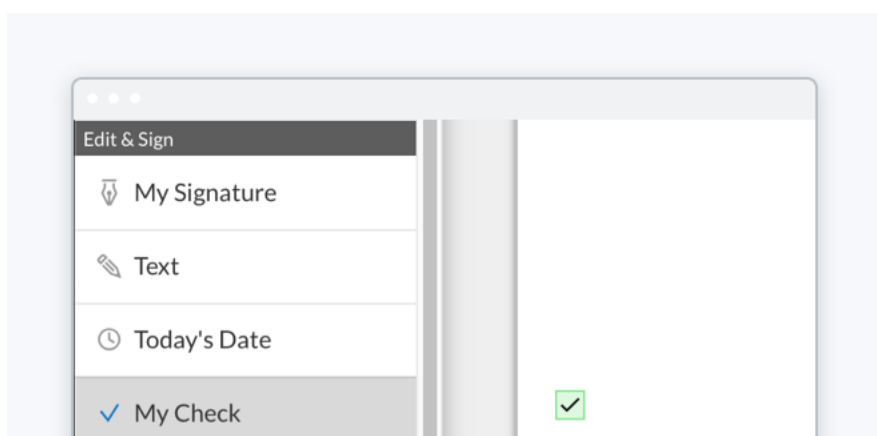
My Signature allows you to add your legally binding e-signature using any desktop or mobile device.



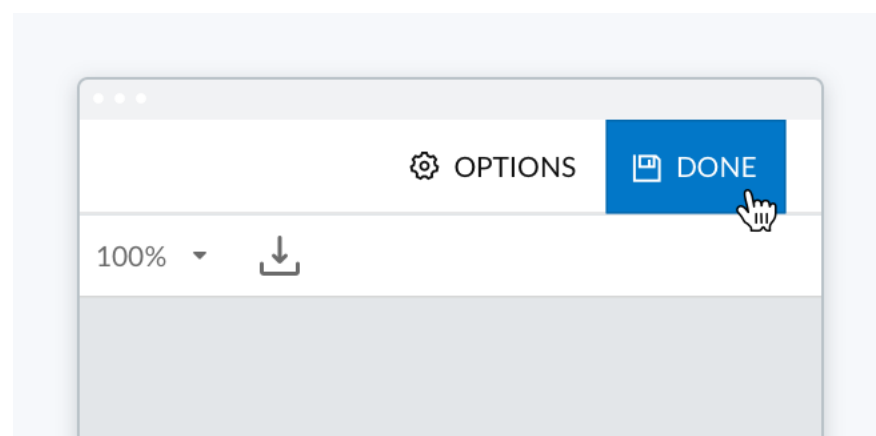
Text is a fast way to add comments or annotations to your recipients anywhere on a document.



Today's Date helps add a current date in a click.



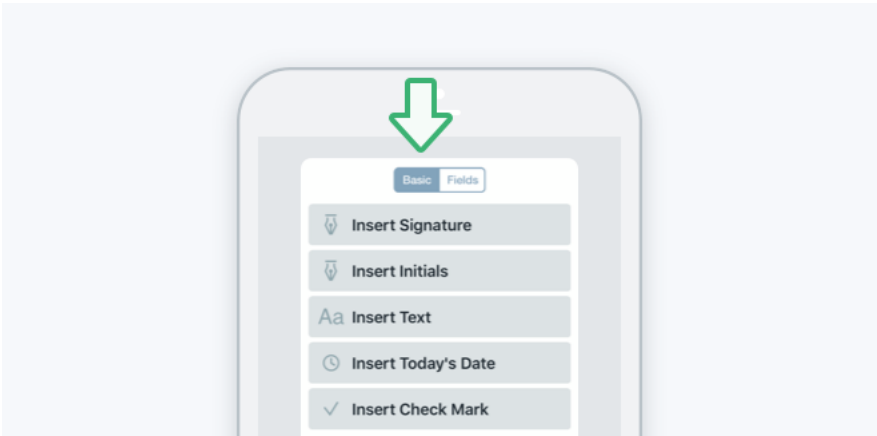
Use **My Check** to add checkmarks where you need them.



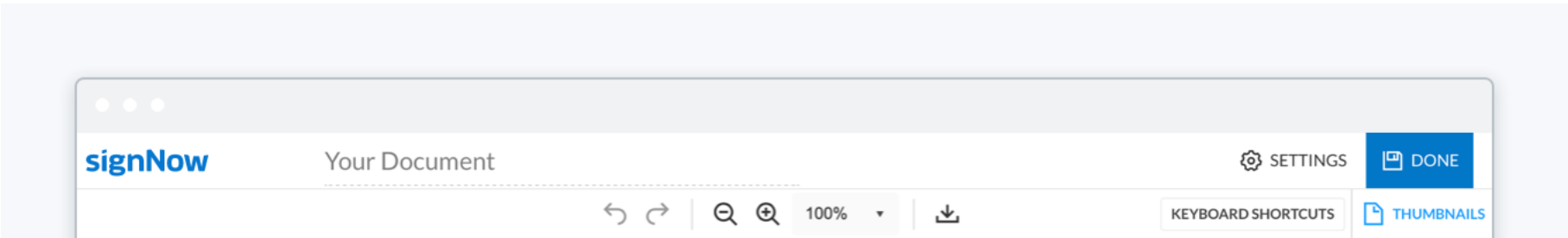
Save all the changes in your document by clicking **DONE** in the top right corner.

Mobile

Tap anywhere on a document and select the **Basic** section. Choose what you'd like to add to your document and tap to insert it.



Some useful tools in the signNow web app



Use the buttons at the top of the screen to:



Undo or Redo the last action.



Adjust a page's view.



Instantly add fillable fields, navigate between fields, zoom in and zoom out, and even download a document using the keyboard shortcuts. Click **KEYBOARD SHORTCUTS** in the top right corner to view the available key combinations.



Zoom in and zoom out pages.



Quickly download your document in PDF format.



Quickly open or close the preview of a document's pages in the sidebar by clicking **THUMBNAILS** in the top right corner.