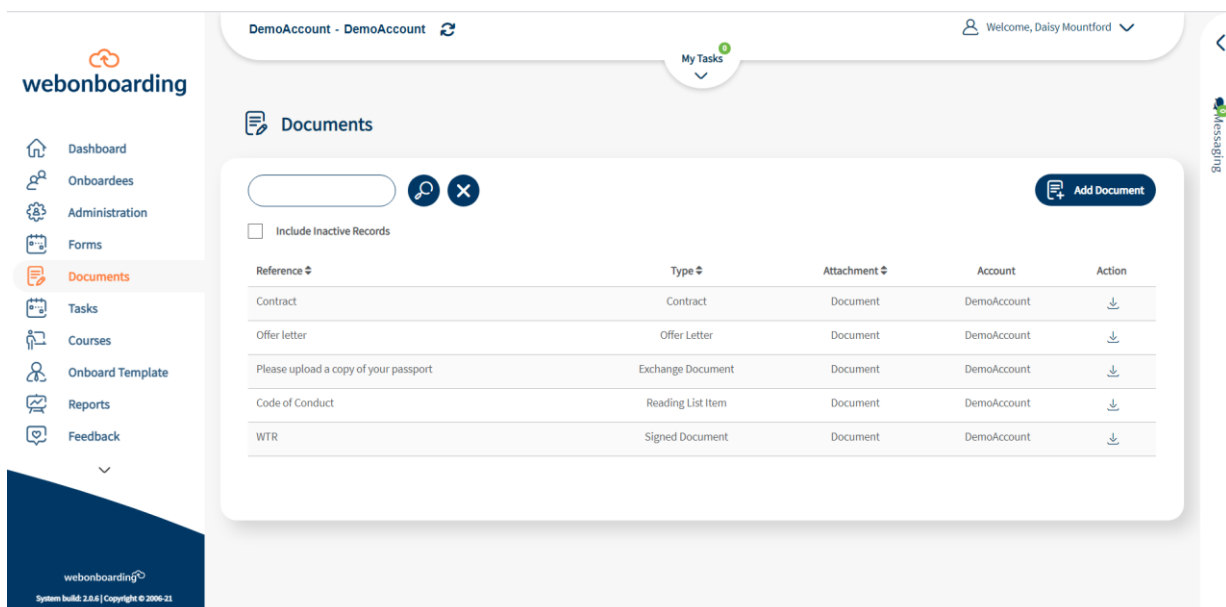


## How to upload contracts, offer letters and additional signed documents.

Initial creation of documents may be done by your implementation consultant, however, should you need to upload any new contracts you can do so. Note that each onbordee must have a Contract document and may have up to 2 additional Signed Documents.

Click documents on left-hand side of the screen.



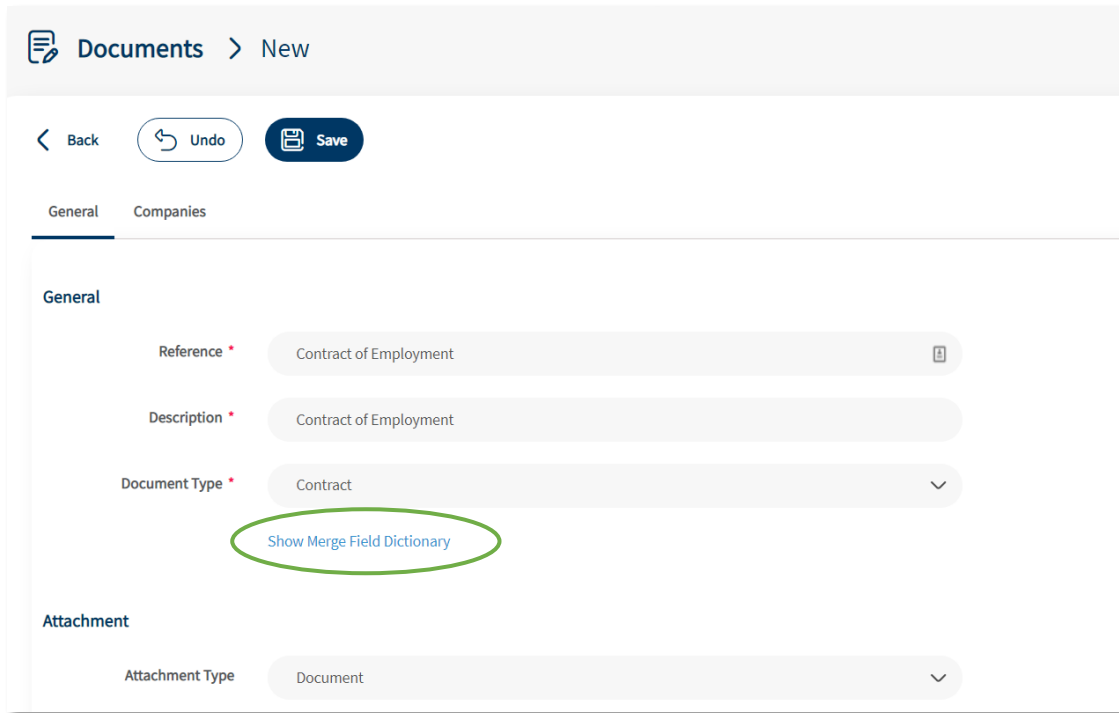
You can then click “add document”.



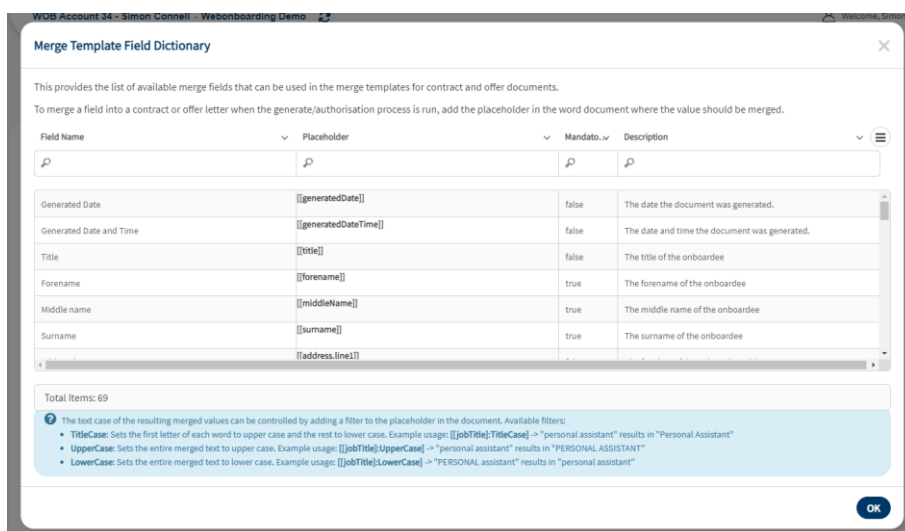
Webonboarding only accepts Microsoft Word DOCX files to use for these documents. There are several items to make sure they have before you add them to Webonboarding:

- For Contracts and Signed Documents - Unique text where you want each signature/date/initials to go. The signing service will use this to find where to add these items
- Merge fields where you want information to be added from the system configuration or the Onboarder record.

The merge field dictionary can be found underneath the “Document Type” drop down when a document that uses merge fields is selected.



When adding merge fields to documents make sure that you use the whole field including both square brackets at each end and you include the exact case of the field as shown in the dictionary. E.g. [[ExampleField]]



NB - if you copy fields straight from the dictionary you might also pick up formatting. Please check this before adding your document to Webonboarding.

You can add a signature field anywhere on a contract document or signed document. The system will look for the unique text that has been added in the Digital Signing Fields section. For example, “Signed:” / “Signature:”.

You can also add an initials field and date signed field with the same principle. Please note that these fields will look for any examples of that text so make sure the place you want the Signature/Date/Initials is the only place in the document with that text.

### Digital Signing Fields

**?** Digital signing fields allow the signing portal to position the user input fields on the contract. Each signing field has a search term shown in blue. On each instance of the search word within the contract the relative input will be required. As a minimum each contract document requires a signature field. How to set the signing fields in edit mode:

1. Click on the blue text within the digital signing field.
2. Edit the search term to match the text at the location in the document.
3. Drag and drop the signing field placeholder (yellow box) to the desired position relative to the search term.

Signature



Add signature field

**?** As well as the signature fields, the date signed and signer initials can be captured.

Add Initials Field

Add Date Signed Field

Once the document is ready to upload select the file and upload.

Ensure that the status is set to Active, this ensures that the new document is available for use in onboarding processes.

**Status**

Active

Inactive

Active

Now use the companies tab at the top of the page to select the Companies in Webonboarding that will have access to this document.

Click Save.