

Seven Steps to Take in Evaluating Online Signature Software Solutions

Understanding the importance of balancing speed and compliance in handling document approvals, businesses of all sizes and across every industry have turned to eSignature solutions to manage document distribution and tracking.

Many eSignature applications can capture digital signatures, but **not all of them offer the additional features that truly improve the speed and productivity of electronic document and signature management:**

1. Easy-to-Use Document Template

The best eSignature solutions offer the ability to create a full library of the documents for which you commonly need signatures.

- The template should allow **customization with an easy, intuitive “1-2-3 Step” document creation process**. Just a few clicks of your mouse should be all you need to insert the required signature fields. Your solution should offer a signature list of regularly used approvers/signers, and an easy method for inserting new or one-time signers.
- The same easy process should include **selecting from a built-in library of custom data fields**, and quick insertion of important features like biometric authentication wherever needed.
- The design wizard should allow for **easy and error-free importation or uploading of your existing document library** into your e-signature account to have them ready to go quickly without a lot of reformatting.

Templates allow for an intuitive “1-2-3” document creation process.

All of this saves time and improves accuracy of the documents you distribute for signature.

2. **Multiple Signers** If your documents are like most businesses, most will require multiple signatures. Examine the documents that you want to be included in your eSignature solution and determine how many of them require more than one signature to be captured. If your eSignature application can only capture a single signature or requires a workaround to capture multiple signatures, the application will not meet your business needs.

Business documents are dynamic and complex components of your business's processes.

3. **Approval Flows** Information flows through your business differently than through any other business. When a digitally signed document needs internal or external approvals, the flow that the document takes is unique. Your eSignature application should not confine you to a single, linear approval flow. It needs to give you complete flexibility to meet your approval flow needs and be customizable to allow for either linear or multi-channel approval processes.

4. **Audit Trails** Ever wonder where a document needing approval is in the signing process? With audit trail capability, your eSignature app will tell you exactly where your documents are, who has and who has not signed them and also who has viewed, edited or printed the document.

5. **Unlimited Use** Several eSignature applications place strict use allowances on their end-users. That means you pay for a specific number of uses before your license expires and you are required to purchase another set of "signings." Fair-Use policies do not limit you to a pre-determined number of application uses, and allow you to scale

up use of e-signatures throughout your organization without unexpected hits to operational budgets.

Fair Use policies do not burden end users with a specific and restrictive use allowance.

6. Legally Compliant With the popularity of electronic signature applications, governments around the world felt compelled to create a set of compliancy standards. These standards, such as UETA and the ESIGN Act, place strict and specific rules with which every eSignature must comply before claiming that they are fully compliant with eSignature laws. Check with your governmental agency to see what laws apply to eSignatures in your area and then ensure that your eSignature application is compliant.

7. Ease of Use It seems that every software manufacturer claims that their software is easy to use but few truly deliver on that promise. eSignature applications are no different. In order for a digital signature application to be truly easy to use, it must employ standardized templates that are customizable, and a logically-designed user interface that does not require a technical background to administer.

If your eSignature application is not easy to use, not only will your employees struggle with it use but so too will your customers and partners