

Getting forms signed – the easy way

E-Sign is the quickest, easiest way to get forms completed and signed. It can be used in two ways:

1. If you need a form completed and/or signed and the client is not with you (see page 3)

The client will receive an email stating that you have requested that they complete/sign the document and will be prompted to click a link to open the website containing the document. They will also be sent a one-time password to their cell phone to enter into the site – guaranteeing that they are the right person.

The client can then 'sign' by simply typing their name and surname into the block that you have marked for them – no need for a touch-screen device or printing, signing and scanning back.

2. If you are with a client and they must complete and/or sign a form (see page 10)

The process is similar to that described in (1) above except the process happens there and then! The client can complete and/or sign the document on your computer/device.

Sound too easy? That's the beauty of E-Sign – it **is** incredibly easy! Read on to find out how to use...

Contact the DOTSS helpline at 0860 1000 43 or on salestechnology.support@sanlam.co.za if you need any assistance

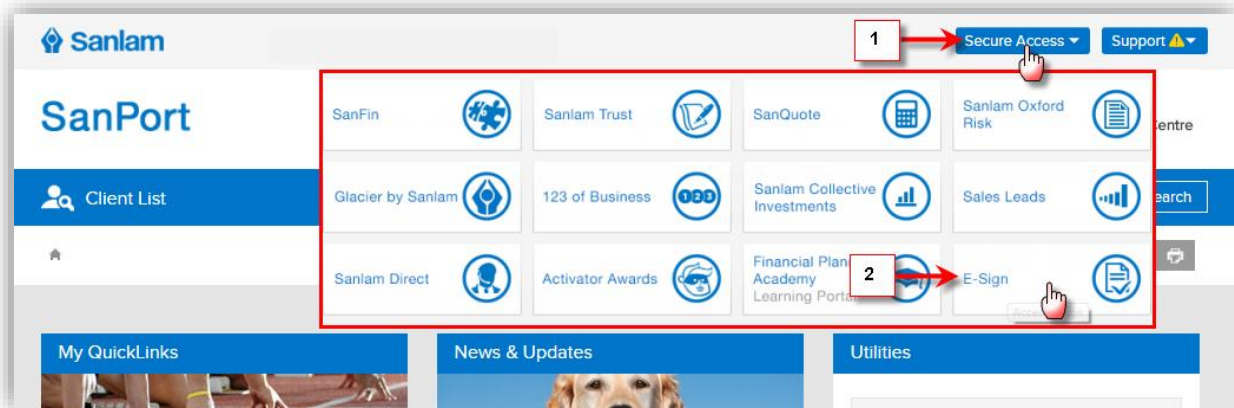
Essential Facts about E-Sign

- ✚ E-Sign may be used for **any documents** requiring a signature by a client or other party, **except for Wills** as this is prohibited by law.
- ✚ Documents are only **saved in E-Sign for 14 days**. Please remember to upload the signed/completed documents to SanFin to save permanently.
- ✚ Sanlam will pay the licencing fees for E-Sign. Therefore the only **cost to you is for the one-time passwords** sent through the system. These cost 25c+VAT for local numbers and 70c+VAT for international numbers. The cost for each month will be totalled up and deducted from your commission account.
- ✚ E-Sign is a **cloud-based storage system**. However, Sanlam is satisfied that the solution meets the requirements of our Cloud / Technology Outsourcing Policy.
- ✚ Anything uploaded to E-Sign is stored in the European Union, which has **strict information protection laws**.
- ✚ Please be assured that **electronic agreements are legal and binding**. In the event of a dispute, it becomes a factual debate and normal rules of evidence will apply.


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How to access E-Sign

If you are an Intermediary, please login to SanPort > Secure Access > E-Sign.



If you are an Intermediary and would like your staff to also be able to make use of E-Sign on your behalf to request clients to sign documents, please go to:

1. SanPort > **My Info** > **Manage My Proxies**.
2. Click  next to the staff member's name on the list of proxies.
3. The list of proxy permissions for this staff member appears – scroll down and click to add the E-signature option as shown here.

E-signature

☒ Send document to client for electronic signature

Submit

4. Click **Submit** to save.
5. The staff member will now also have an E-Sign tile under their SanPort – Secure Access options.

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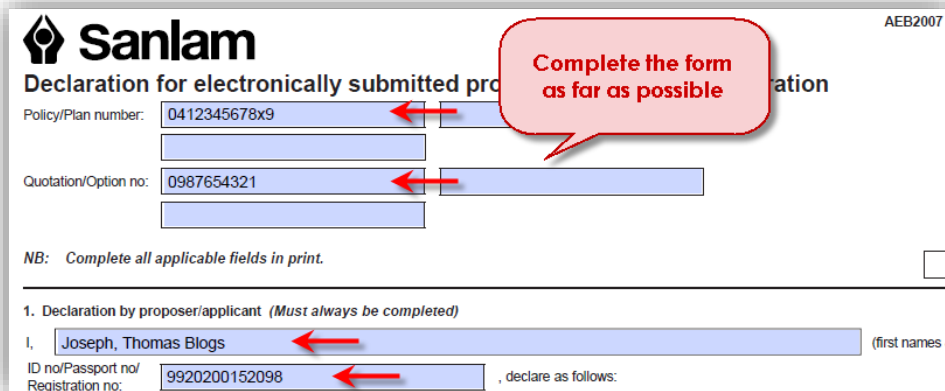
If you need a form completed and/or signed and the client is not with you

1

Prepare the form which you need the client to complete/sign by filling in the fields as needed.

Save the completed document to your computer.

It must be in .PDF format to be used with E-Sign.

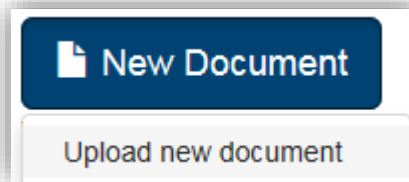


The form is titled "Sanlam Declaration for electronically submitted proposals". It includes fields for "Policy/Plan number" (0412345678x9) and "Quotation/Option no." (0987654321). A red speech bubble points to these fields with the text "Complete the form as far as possible". Below these fields is a section for "Declaration by proposer/applicant (Must always be completed)". It includes a field for "I, Joseph, Thomas Blogs" (first names & last name) and "ID no/Passport no/Registration no." (9920200152098). A note at the bottom says "NB: Complete all applicable fields in print."

2

To add your document to E-Sign, click **New Document**, **Upload new document**

Browse to the document which you previously filled in and stored in step 1.



A button labeled "New Document" with a document icon, and a button labeled "Upload new document" below it.

3

Complete the section which asks 'Who must sign?' with details of all persons who must complete/sign the document.

The persons captured as 1, 2, etc. will be notified that they need to sign in the order in which they were added. So, only after person 1 has signed in full, will person 2 be notified that they need to sign and so on.



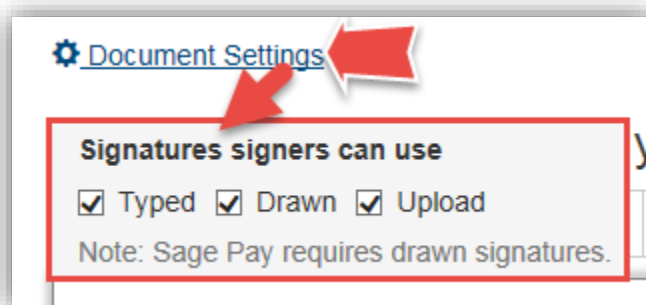
The form is titled "Who must sign?". It includes a note: "Add all the people who should sign this document. The signatories are emailed in the order they appear in the list below." There are two rows of signatories. Row 1: "1" (Life Ass), "Joseph Blogs", "joeblogs@mailbox.co.za", "+27", "+27831234567". Row 2: "2" (Role (or Name)), "Email", "+27", "Mobile". There are buttons for "+ Signer" and "+ CC" at the bottom.

Add as many individuals as needed, making sure to complete the email address AND cell phone number for each as the system needs both to verify the identity of the person who signs.

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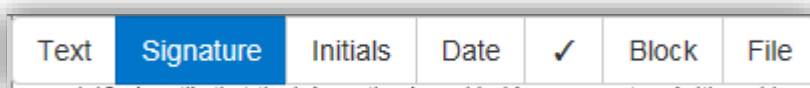
4

Document Settings can be used to specify how the client must sign (add signatures) to the document. Although Sanlam accepts any of the 3, if another provider requires a proper signature, uncheck 'Typed' and 'Upload' so that the client can ONLY use a 'Drawn' signature. They can then draw their signature using a mouse, track pad or touch screen device.



5

You will now need to indicate what/where on the document must be completed/signed by the clients. To **indicate where the client should sign**, click the **Signature** button on the toolbar.



6

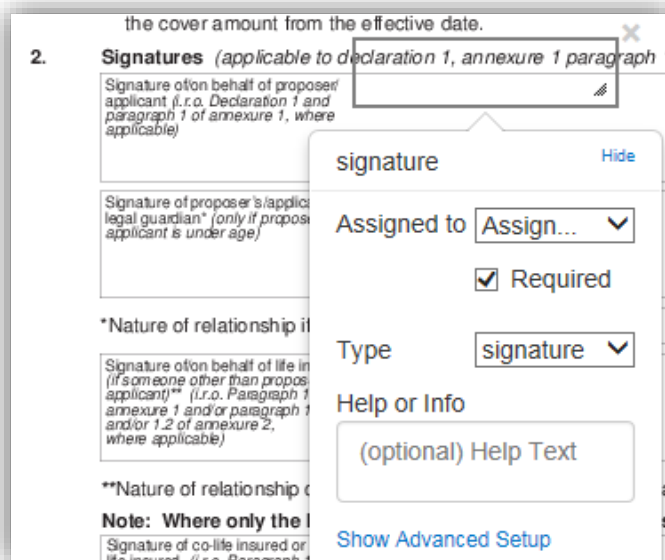
Click on the document where the signature is needed.

A block appears – resize the block (by dragging on the bottom line) and click and drag it to the perfect spot.

Click the **Assigned to** dropdown and **choose the name of the person who must sign** here.

Please ensure that the **Required** checkbox is marked for all fields.

Make sure the **Type** is shown as 'signature'.



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7

To indicate where the client should complete information (fill in fields e.g. the date of signing), click the **Text** button on the toolbar.



8

Click on the document where the text is needed e.g. date of signature. (Here I use the date button and tick the box that says auto complete!)

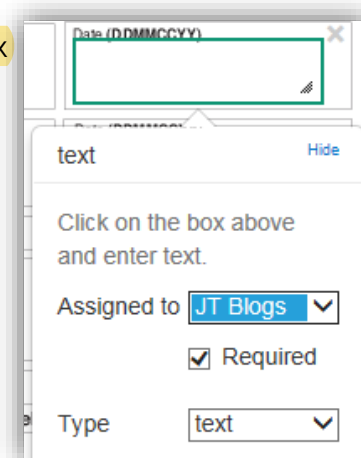
A block appears – resize the block (by dragging on the bottom line) and click and drag it to the perfect spot.

Choose the right person from the **Assigned to** dropdown.

Please ensure that the **Required** checkbox is marked for all fields.

Make sure the **Type** is shown as 'text'.

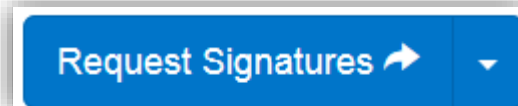
Add helpful information to the **Help or Info** text box if you want (what they should complete here).



Please Note: E- Sign is not really suitable if a lengthy form with a lot of fields must be completed by the client (as you will need to draw a block on each and every field that must be completed). In these cases it might be better to simply email the form to the client for them to print, complete, sign, scan and email back to you (if the client has access to printing/scanning facilities).

9

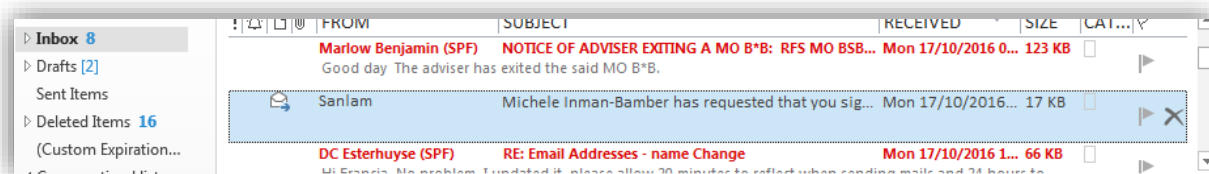
Once you have added all the necessary blocks to the document for signatures and completion, scroll back to the top of the document and click **Request Signatures** to send to the persons added.



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10

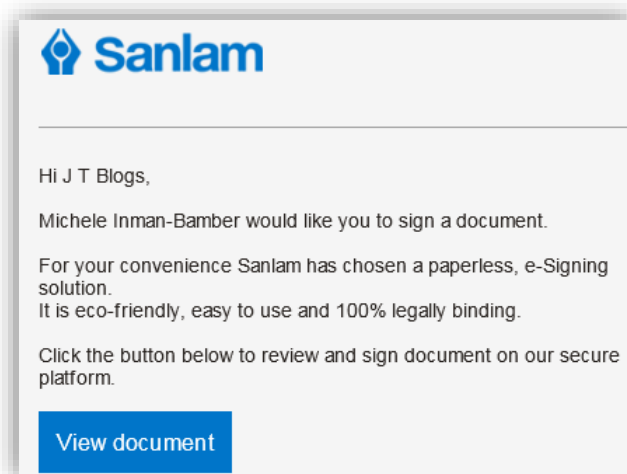
The clients each receive an email from E-Sign.



11

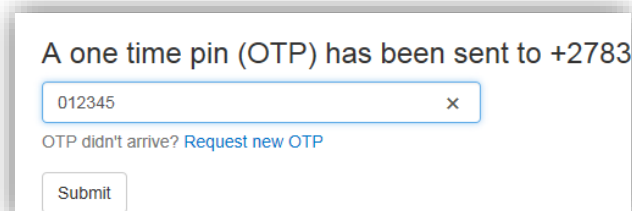
The email reads as shown here.

The client will need to click **View document** to continue.



12

They will not be able to open the document until they type in the one-time password which will be sent to their cell phone (when they click the link in the email).



This is a double-method of identifying the client (email plus cell phone) to ensure that the right person is signing.

13

The document opens with a brief introduction.

Client reads and when done, clicks **Got it**.



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14

They will be taken directly to the required fields.

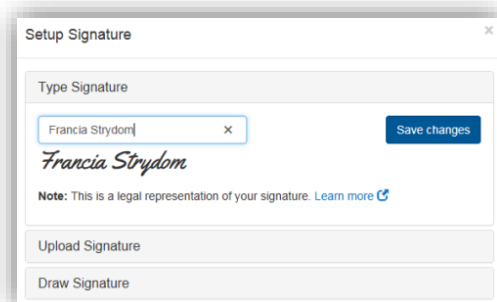
To add their signature, they click **Change Signature**.



15

The client has a number of options for signing (depending on any restrictions you added under 'Document Settings' when preparing the document).

1. **Type Signature** – this is the easiest option and perfect for a client who does not have a touch-screen device. They simply type their signature into the block provided.
2. **Upload Signature** – for the client who has their signature stored electronically.
3. **Draw Signature** – for the client who has a touch-screen device and can sign on the screen.



Click to **Save Changes**.

16

The client completes all the fields indicated for them using 'Next' to navigate.



To finish, they click **Done signing** to return the completed document to you.

17

You will be sent an email to notify you that all required clients have signed the document. The client will also have access to the completed document for their records and will be sent an email to this effect.

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18

Go back into e-sign and click to view the document.

View

19

The document includes an **audit trail** at the end which shows exactly who did what with the document.

Audit trail		
2016-10-17 14:34:24 SAST+0200	francia.strydom@sanlam.co.za received and opened email	196.214.133.241
2016-10-17 14:34:13 SAST+0200	OTP sent to: +27835568878 (Francia Strydom)	
2016-10-17 14:33:01 SAST+0200	Email has been received by francia.strydom@sanlam.co.za mail server	167.89.84.21
2016-10-17 14:33:01 SAST+0200	Email has been received by michele.bamber@sanlam.co.za mail server	167.89.84.21
2016-10-17 14:31:49 SAST+0200	Document status marked as complete. Signed copies have been emailed to all parties.	
2016-10-17 14:31:44 SAST+0200	francia.strydom@sanlam.co.za (Francia Strydom) completed signing document	196.214.134.25
2016-10-17 14:28:57 SAST+0200	francia.strydom@sanlam.co.za (J T Blogs) opened document	196.214.134.25
2016-10-17 14:28:57 SAST+0200	francia.strydom@sanlam.co.za (J T Blogs) entered secret etc	196.214.134.25

The audit trail is CRITICAL to the integrity/validity of the document. This will be used in the event of a dispute.

It is important not to make any further changes to the document e.g. printing, editing and scanning it back as this will invalidate the audit trail and could render the document invalid!

20

To save a copy of the document to email/upload to SanFin, click **Download Document. This is essential because the document only remains in E-Sign for 14 days.**

Download document

Don't forget to upload the document to Sanfin or your own filing system for permanent storage.

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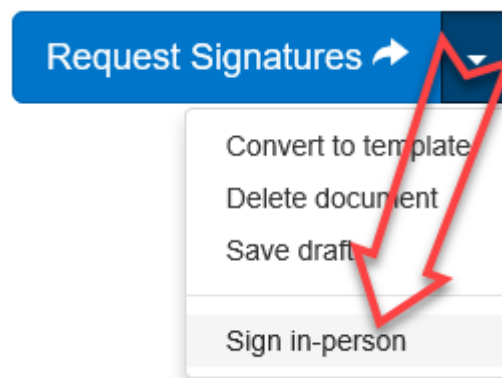
If you are with a client and they must complete and/or sign a form

1

Follow steps 1 to 8 in the previous section (1).

2

To request completion/signing of the document, click the dropdown next to 'Request Signatures' and choose 'Sign in-person'.



3

Sign now

On the following screen click 'Sign now' to continue.

4

Got it

A brief explanation of the process appears, click 'Got it' to continue.

5

Continue as normal to complete/sign the document. Click 'Done signing' when complete.



6

Type in the One Time Password which was sent to the client's phone and click to acknowledge that this was 'signed in each other's presence'.

An OTP was sent to +27835568878. Please enter the OTP below.

1234

☒ Signed in each other's presence.

7

Verify and Sign ✓

To finalise, click 'Verify and Sign'.

8

The document is now completed. Remember to click on 'Download' to save the document to your own filing system/forward on for processing. The client will also receive an email from E-Sign giving them access to the completed document.

Download document

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