

Vendor Electronic Contracting/Signature Training Guide

You will receive an email notification from DocuSign informing you of a contract requiring your signature. Click Review Document and it will take you to the contract within DocuSign. The email will also have the name of the individual from the county that initiated the electronic contracting process. If you have questions regarding the process, please refer to this individual. You may also refer to the vendor training video located on the county's website.



Mary Morrison

mmorrison@catawbacountync.gov

Catawba County Government has implemented an electronic contracting process. Please review the contract with Catawba County Social Services.

Upon your review e-sign the document by selecting and dragging the Signature field to the signature line located within the document. In addition, select and drag the date signed, name, and title fields to the proper location within the document. Please verify the accuracy of the information placed on the document. If you are not the correct individual that possesses the authority to sign contracts within your organization, you may reassign the e-signing task to the appropriate authority within your organization by selecting the OTHER ACTIONS menu and clicking Assign to Someone Else. You will be asked the name and email address of the new signer and the reason why the signer is changing.

Additional notes to Vendors:

Vendors should review any attachments and e-sign in the appropriate section. After e-signing the document you may download a copy for your records or you can access the document via an email through DocuSign that will be submitted

Vendor Electronic Contracting/Signature Training Guide

After clicking Review Document you will be taken to the contract via DocuSign®. You will be asked to agree to use your electronic signature by checking the box near the agreement statement. If you wish to see the county's Electronic Records and Signature Disclosure click on the link labeled the same.

Once you've checked the box agreeing to e-sign the contract select CONTINUE.


Please Review & Act on These Documents



Mary Morrison
Catawba County

Catawba County Government has implemented an electronic contracting process. Please review the contract with Catawba County Social Services.

[View More](#)

 Please read the [Electronic Records and Signature Disclosure](#).

I agree to use electronic records and signatures.

DocuSign Envelope ID: D4780DBA-D54C-445C-822F-86B76A6EBE76

Test Contract for Free Placement of Signatures

Test Agreement Test Agreement Test Agreement Test Agreement Test Agreement Test Agreement

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Vendor Electronic Contracting/Signature Training Guide

Now you can read the document in its entirety. ONLY individuals with authority to enter into contracts can sign the document. If you are not the authorized individual, you can reassign the signing task to another individual within your company. Please see the section titled "Reassigning".

When ready to sign select the Signature field to the left of the screen and drag it to the signature line. The system will take you to a screen to confirm your name and signature information.

Please review the documents below. OTHER ACTION

DocuSign Envelope ID: D4780DBA-D54C-445C-822F-86B76A6EBE76

Test Contract for Free Placement of Signatures

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Test Vendor Name

Rv :

FIELDS

- Signature
- Initial
- Date Signed
- Name
- First Name
- Last Name
- Email Address
- Company
- Title
- Text
- Checkbox

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Confirm the spelling of your name and your initials. Your signature will appear in a preformatted style. You can change the style by clicking Change Style or you can draw your signature by clicking Draw. Drawing your signature works better if you have touch screen. After you are satisfied with your signature click Adopt and Sign.

Adopt Your Signature ✕

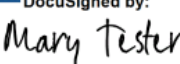

Confirm your name, initials, and signature.

Full Name

Initials

[Select Style](#) [Draw](#)

PREVIEW [Change Style](#)

DocuSigned by:

845AF062CBC94D6... 





By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.






[ADOPT AND SIGN](#) [CANCEL](#)



Vendor Electronic Contracting/Signature Training Guide

Your signature will appear on the contract in the place that you dragged your signature. Please make sure you add your signature at every place on the document that it's required. You can now add the other required information such as name, title, company, and date. The date will automatically default to the current date.

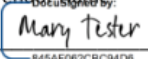
FIELDS

-  Signature
-  Initial
-  Date Signed
-  Name

-  First Name
-  Last Name
-  Email Address
-  Company
-  Title

-  Text
-  Checkbox

Test Agreement Test Agreement Test Agreement Test Agreement Test Agreement Test Agreement
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Test Vendor Name
By: 
845AF062CBC94D6...
Name: _____
Title: _____
Date: _____

Catawba County Government

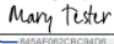
Vendor Electronic Contracting/Signature Training Guide

If you noticed that you've made a mistake you can click the red "X" near the field entry and it will remove that information. Once you've added your signature and all other necessary information you can click Finish.

FIELDS


-  Signature
-  Initial
-  Date Signed
-  Name
-  First Name
-  Last Name
-  Email Address
-  Company
-  Title
-  Text
-  Checkbox

Test Agreement Test Agreement Test Agreement Test Agreement Test Agreement Test Agreement Test Agreement
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Test Vendor Name
By: 

Name:

Title:

Date: 

Catawba County Government

By: _____

Name: _____



Title: _____

Date: _____

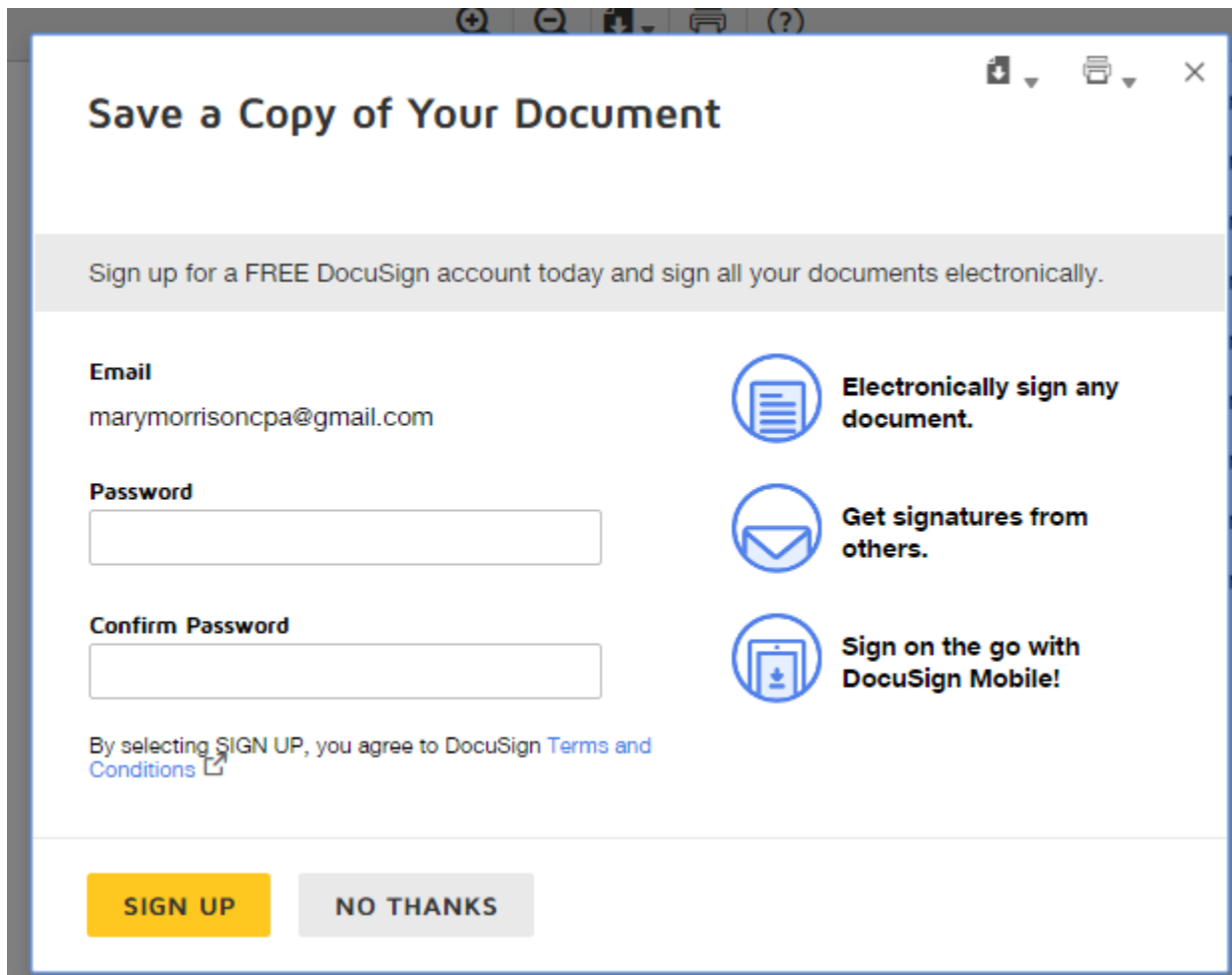
110-410200-842520

Completed document. **FINISH**

Vendor Electronic Contracting/Signature Training Guide

This message box below will display. You can print the completed document by clicking the print icon  in the upper right corner or you can download the completed document by clicking the download icon 

You will also receive an email with a link to the document where you can save it or print it for your records.



Save a Copy of Your Document

Sign up for a FREE DocuSign account today and sign all your documents electronically.

Email
marymorrisoncpa@gmail.com

Password

Confirm Password

Electronically sign any document.

Get signatures from others.

Sign on the go with DocuSign Mobile!

By selecting SIGN UP, you agree to DocuSign [Terms and Conditions](#)

SIGN UP **NO THANKS**

Vendor Electronic Contracting/Signature Training Guide

Reassigning

If you need to reassign the signing task to someone else in your company go to OTHER ACTIONS and select Assign to Someone Else.

Please Review & Act on These Documents



Effective xx/xx/2017 Catawba County Government has implemented an electronic contracting process. Please review the contract with Catawba County Technology Department.

[View More](#)

The screenshot shows a document review page for a DocuSign envelope. The document is titled "STATE OF NORTH CAROLINA COUNTY OF CATAWBA AGREEMENT". The document text includes: "THIS AGREEMENT, made this 1st day of December 2016, by and between Catawba County, a political subdivision of the State of North Carolina (hereinafter "County") and City of Technology Department, a subdivision of the State of USA (hereinafter "Tester")." and "WHEREAS, Tester, which relies extensively upon the use of Microsoft servers in its day-to-day operations, requires backup and recovery solutions to recover from hardware or software failure." The interface includes a "CONTINUE" button and an "OTHER ACTIONS" menu. The "OTHER ACTIONS" menu is open, showing options: "FINISH LATER", "PRINT & SIGN", "ASSIGN TO SOMEONE ELSE" (highlighted in yellow), and "DECLINE TO SIGN". Below the menu are links for "Help & Support", "View History", "View Certificate (PDF)", "About DocuSign", and "View Electronic Record and Signature Disclosure".

Enter in the email address and name of the new signer along with a reason this task was reassigned to someone else. Once that information is entered click Assign to Someone Else. The county will be notified of the reassignment.

The screenshot shows a dialog box titled "Assign to Someone Else" with a close button (X) in the top right corner. The dialog contains the following fields and text:

- Email Address for the New Signer:** A text input field containing "Marytester@gmail.com".
- New Signer's Name:** A text input field containing "Mary Tester".
- Reason:** A text area with the text "Forwarding to the appropriate staff. Mary Tester is the CEO and is authorized to sign". Below the text area, it says "characters remaining 166/250".
- Instructions:** "Please provide a reason to Mary Morrison for changing signing responsibility".
- Disclaimer:** "Selecting the Assign to Someone Else button will send a notification to the person to whom you assigned this envelope. The original sender will also receive a notification. You will be added as a Carbon Copy (CC) recipient."
- Buttons:** A yellow "ASSIGN TO SOMEONE ELSE" button and a grey "CANCEL" button. A hand cursor is pointing at the "ASSIGN TO SOMEONE ELSE" button.

Vendor Electronic Contracting/Signature Training Guide

Declining

You have the right to decline the contract and the right to refuse to participate in electronic contracting. If you choose to decline the contract go to Other Actions and select Decline to Sign. The county will receive an email indicating the rejection of the contract.

How to Review & Act on These Documents

on
County



Catawba County Government has implemented an electronic contracting process. Please review the County Technology Department.

The screenshot shows a DocuSign document review interface. The document is titled "STATE OF NORTH CAROLINA COUNTY OF CATAWBA AGREEMENT". The text of the agreement is partially visible, including the date "THIS AGREEMENT, made this 1st day of December 2016, by and between Catawba County, a political subdivision of the State of North Carolina (hereinafter "County") and City of Tester, a political subdivision of the State of USA (hereinafter "Tester")."

The interface includes a sidebar with the following options:

- CONTINUE** (highlighted in yellow)
- OTHER ACTIONS** (highlighted in yellow)
- FINISH LATER**: Save the document in its current state and finish the signing process at a later time.
- PRINT & SIGN**: Print the document and sign in ink. Then either scan and upload or fax back the document.
- ASSIGN TO SOMEONE ELSE**: Should someone else be signing? Provide the new signer's email address and send the document to them for signature.
- DECLINE TO SIGN** (highlighted in yellow): Notify the sender that you refuse to sign the document.

Additional links in the sidebar include: Help & Support, View History, View Electronic Record and Signature Disclosure, About DocuSign, and View Certificate (PDF).