

Option to Capture Digital Signature

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Q. I need my customers to be able to digitally sign and return documents I have sent them.

A. If a digital signature option is not available in Agvance for the document sent, here are two options outside of Agvance that may help.

Note: Although some documents may be automatically e-mailed to a customer from Agvance through the CRM module, please note that nothing is automatically saved back into Agvance when a customer returns the signed document.

Note: The legality of the digital signature should be reviewed and verified by the company when using these options.

Option 1

The Adobe Fill & Sign app is a free and easy way to allow customers to digitally sign and return a document that has been e-mailed to them. This app is available for download from Google Play or the App Store.

When the customer receives a PDF document via e-mail, they download it to their device, open the Adobe Fill & Sign app, and browse to view the PDF document. There is an option to sign each form or a signature may be created to use repeatedly on various forms. Once the signature is on the document, it may be e-mailed back to the sender.

Option 2

If the latest version of iOS has been installed and the e-mail account setup is done on the iPhone or iPad, the Markup tool is available with Mail. With this tool the customer can sign the PDF document and return it to the sender by replying to the original e-mail or by attaching it to a new e-mail to send. Signatures may be saved to reuse.