



XRero Sign

Electronic Signatures & Document Signing — User Manual

For administrators, senders & signers

United Arab Emirates edition

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Every screen in this manual reproduces the live XRero Sign module. All names and content shown are demonstration data.

1. Introduction & how it works

XRero Sign lets you get documents signed electronically — no printing, scanning or posting. You upload a PDF, drop **fields** on it (a signature box, a date, a text line...), choose **who** signs where, and send. Each signer receives a secure link, signs in their browser, and you get back a single **completed PDF** with a tamper-evident **integrity hash** and a **signing certificate** that records who signed, when and from where.

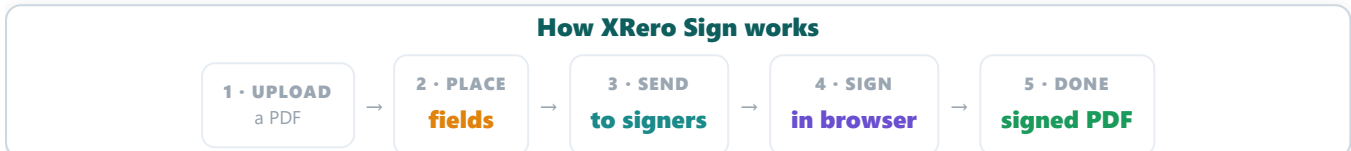


Figure 1.1 — Upload, place fields, send, sign, done — a complete signing round in five steps.

This manual covers both sides: the **sender** (an internal Xrero user who prepares and sends documents) and the **signer** (anyone who receives a link — they need no Xrero account). Typical UAE uses: tenancy contracts, offer letters, NDAs, purchase agreements and approval forms.

Good to know

Signers don't need a login. They sign from the secure portal link you send them, on any device with a browser.

2. Getting Started & the menu

Sign in to Xrero and open **XRero Sign** from the apps menu. The top menu has four areas.

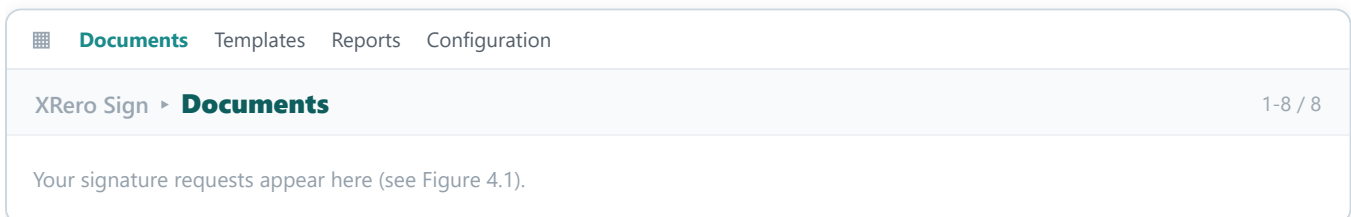


Figure 2.1 — The XRero Sign menu.

Menu	What you'll find there
Documents	Every signature request and its status.
Templates	Reusable documents with fields already placed.
Reports	The Signature Requests dashboard for analysis.
Configuration	Field Types and Signer Roles.

3. Key concepts

Five ideas explain the whole module. Keep them in mind and everything else falls into place.

Concept	Meaning
Template	A PDF with fields placed on it, saved for re-use (e.g. your standard tenancy contract).
Request	One signing job: a document sent to one or more signers. Has a status.
Signer	A person who must sign — identified by name & email (no account needed).
Field	A box placed on the page for a signer to fill — signature, initial, text, date or checkbox.
Role	A label like "Tenant" or "Landlord" that maps each field to the right signer.

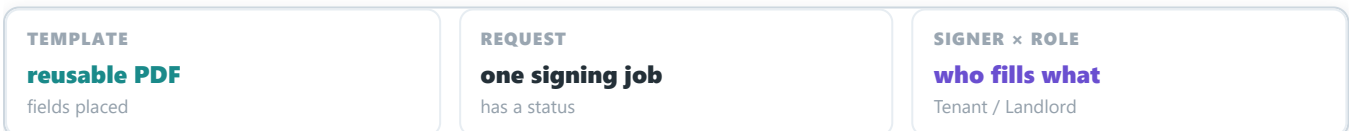


Figure 3.1 — A template's fields are assigned to roles; a request maps each role to a real signer.

4. The Documents list

Menu path: XRero Sign ▶ Documents

The Documents list shows every request with its **reference**, the template it came from, the signing **progress** and its **status**. A request moves through five statuses.

XRero Sign ▸ **Documents** 1-5 / 5

REFERENCE	TEMPLATE	PROGRESS	STATUS
SIGN/2026/0007	Tenancy Contract	2 / 2	Fully Signed
SIGN/2026/0008	Offer Letter	0 / 1	Sent
SIGN/2026/0009	NDA	1 / 2	Sent
SIGN/2026/0010	Purchase Agreement	—	Draft
SIGN/2026/0006	Service Quote	0 / 1	Cancelled

Figure 4.1 — The Documents list: reference, template, progress and status at a glance.

Status	Meaning
Draft	Being prepared; not yet sent.
Sent	Waiting for one or more signers.
Fully Signed	Everyone has signed; completed PDF ready.
Refused	A signer declined to sign.
Cancelled	The sender stopped the request.

5. Quick send — sign a one-off PDF

For a document you'll only send once, you don't need a template. From **Documents ▸ New**, upload the PDF, place a few fields, add the signer and send — all on one record.

- 1 Click **New**; a draft request opens.
- 2 Click **Upload PDF** and choose your file.
- 3 Place fields on the page (Chapter 7) and add the signer (Chapter 10).
- 4 Click **Send**.

Documents ▸ **New** Draft

Reference	SIGN/2026/0011
Document	Approval Form.pdf
Signers	1 to add

Figure 5.1 — A one-off request: upload a PDF, place fields, add a signer, send.

6. Creating a reusable Template

Menu path: XRero Sign ▸ Templates ▸ New

If you send the same document often — a tenancy contract, an offer letter — make it a **template** once, with all fields placed, and reuse it forever. Each new request from the template starts ready to send.

- 1 Click and give the template a **Name**.
- 2 Click to attach the document.
- 3 Place fields and assign each to a **role** (Chapters 7–9).
- 4 Save. Later, click to create a request from it.

Templates ▸ **Tenancy Contract** 1 / 3

Name	Tenancy Contract
Document	tenancy_contract.pdf
Roles	Tenant, Landlord
Fields placed	6

Figure 6.1 — A reusable template with its PDF, roles and placed fields.

7. Placing fields on the document

Fields are the boxes a signer fills. In the field editor, the PDF is shown page by page; pick a field type and click (or drag) where it should go. Each field can be resized and assigned to a role.

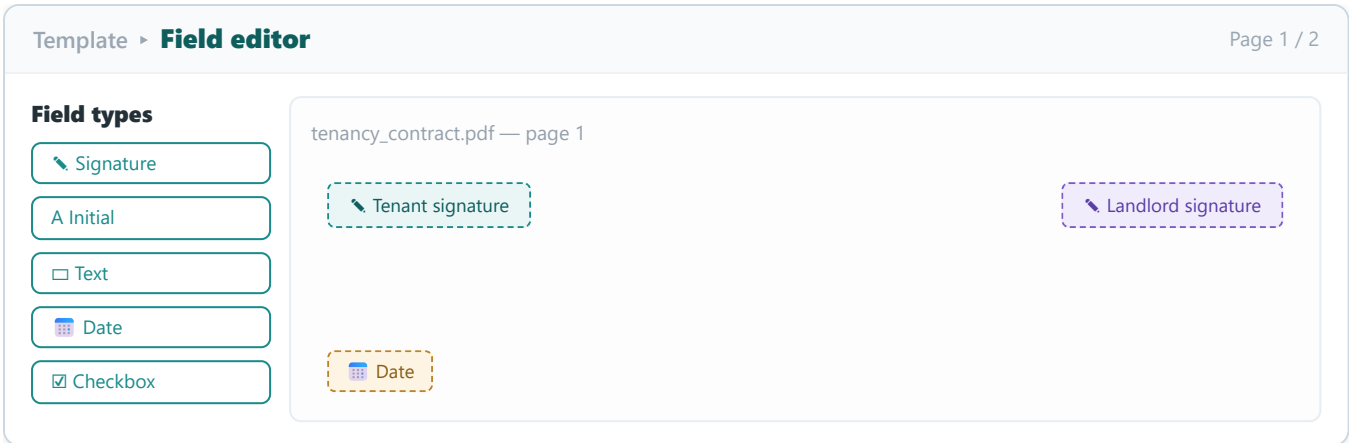


Figure 7.1 — The field editor: choose a field type from the left, then click where it belongs on the page.

Tip

Colour-code by role — here the tenant's fields are teal and the landlord's are violet — so it's obvious who fills what.

8. Field types in detail

Menu path: Configuration > Field Types

XRero Sign ships with five field types. Each has a default size and a helpful tip shown to the signer; text fields can **auto-fill** from the signer's details.

FIELD TYPE	SIGNER DOES	TIP SHOWN
Signature	Draws / types a signature	"Click to sign"
A Initial	Adds their initials	"Click to add initials"
<input type="checkbox"/> Text	Types text (can auto-fill name)	"Enter text"
Date	Picks / confirms a date	"Pick a date"
<input checked="" type="checkbox"/> Checkbox	Ticks to agree	"Check to accept"

Figure 8.1 — The five built-in field types and what each asks the signer to do.

9. Signer roles

Menu path: Configuration > Signer Roles

A **role** connects a field to the right person. If a contract needs a Tenant signature and a Landlord signature, you create two roles, assign each field to a role, and when you send you simply say **who** plays each role. The same template then works for any tenant–landlord pair.

ROLE	USED FOR
Tenant	The person renting
Landlord	The property owner
Witness	Optional third party

Figure 9.1 — Roles let one template serve many signing pairs.

10. Adding signers to a request

On the request, the **Signers** list maps each role to a real person — their **name** and **email**. The signing **order** is the list order; the first signer is notified first when you use sequential signing.

#	ROLE	NAME	EMAIL	STATE
1	Tenant	Ahmed Ali	ahmed@example.ae	Draft
2	Landlord	Sara Khan	sara@example.ae	Draft

Figure 10.1 — The Signers tab maps each role to a real name and email address.

11. Subject, message & CC

Before sending, set the email **Subject** and a short **Message** the signers will read, and optionally add **CC** recipients who should receive the final signed copy without signing themselves (e.g. your records inbox).

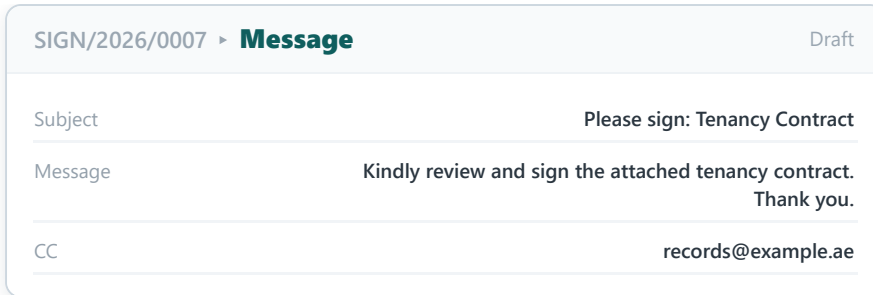


Figure 11.1 — The subject, message and CC recipients for the signing invitation.

12. Sending the request

Click **Send**. Each signer is emailed a secure link, the request moves to **Sent**, and every signer's state becomes **Sent**. From here you watch progress until everyone has signed.



Figure 12.1 — After Send, signers are emailed their links and the request is "Sent".

Before you send

Check the signers' email addresses carefully — the link goes straight to that address. A typo means the wrong person could open the document.

13. The signing experience

The signer clicks the link in their email and the document opens in their browser — no login. They see the pages, the fields highlighted, and a clear **Sign** action. This is the **portal** view and works on phone, tablet or computer.



Figure 13.1 — The signer's portal view: the document with highlighted fields and a Sign button.

14. Drawing a signature

When the signer clicks a signature field, a **signature pad** opens. They can **draw** with a finger or mouse, **type** their name in a signature font, or **upload** an image of their signature. The chosen signature is then placed in the box.

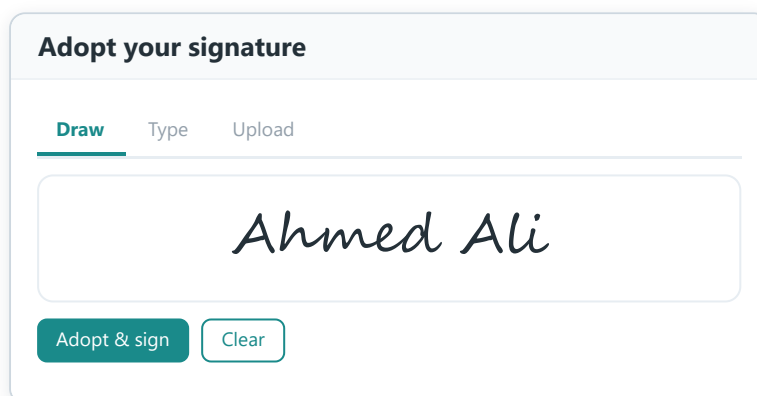


Figure 14.1 — The signature pad: draw, type or upload a signature.

15. Filling text, date & checkbox fields

Besides signing, the signer completes any other fields you placed: **text** boxes (typed in), **date** fields (picked or auto-set to the signing day) and **checkboxes** (ticked to agree). Required fields must be filled before the document can be submitted.

Complete the fields	
<input type="checkbox"/> Full name	Ahmed Ali
<input type="text"/> Date	2026-05-22
<input checked="" type="checkbox"/> I agree to the terms	✓ Ticked

Figure 15.1 — Text, date and checkbox fields the signer fills alongside the signature.

16. Submitting or refusing

Once every required field is filled, the signer clicks **Validate & Sign** to submit. Their state becomes **Completed**. If they cannot sign, they can **Refuse** and give a reason — the request then moves to **Refused** and you're notified.

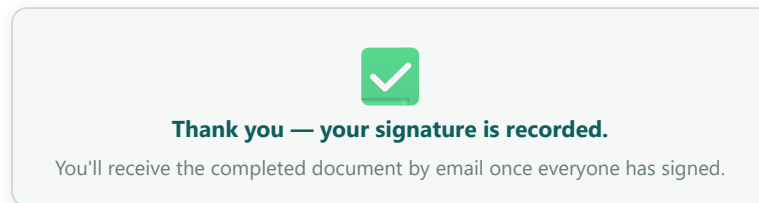


Figure 16.1 — The confirmation a signer sees after submitting.

17. Tracking progress

Back in **Documents**, each request shows a live **progress** count — how many signers are done out of the total. As each person signs, their state turns to **Completed** and the bar advances. When the last signer finishes, the whole request becomes **Fully Signed**.

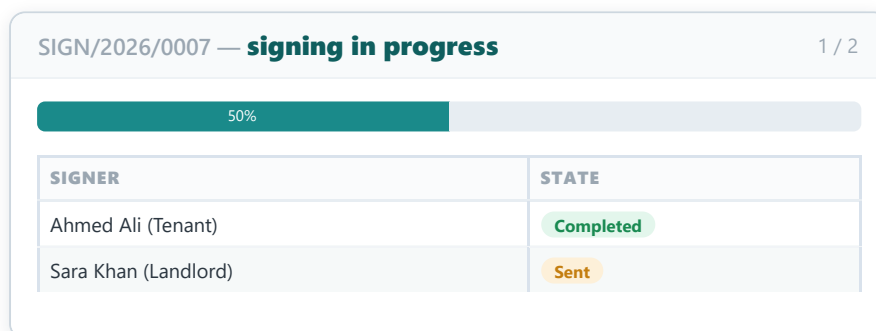


Figure 17.1 — Live progress: one of two signers done; the request is half complete.

18. Reminders & resending

If a signer is slow, open the request and click **Resend** to email the link again. This is handy when an invitation is missed or buried in an inbox — the link and document are unchanged. You can resend to **everyone still pending** at once, or to a single signer from their row in the Signers list. The **last-sent** date next to each signer tells you who has already been chased and when, so you don't pester someone twice in a day.

SIGN/2026/0007 ▸ **Signers** Sent

SIGNER	STATE	LAST SENT	ACTION
Ahmed Ali	Completed	—	—
Sara Khan	Sent	2 days ago	Resend

Figure 18.1 — Resend the link to a pending signer; the "last sent" column stops you chasing twice.

Note

Resending does not reset anything a signer has already done; it simply nudges those who haven't finished.

19. Cancelling a request

If a document is no longer needed, open it and click [Cancel](#). The request moves to **Cancelled** and the signing links stop working, so no one can sign it afterwards. Cancelling is reversible only by creating a fresh request.

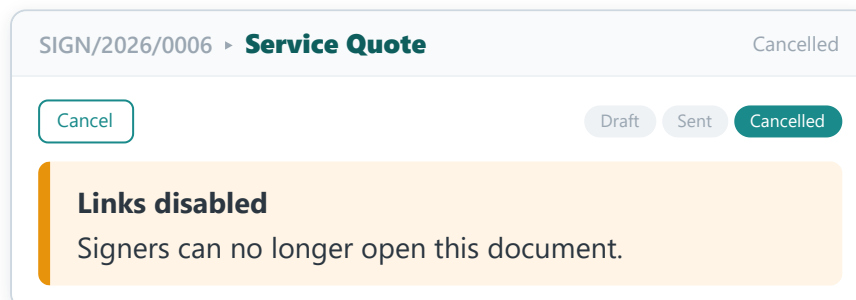


Figure 19.1 — A cancelled request: the signing links are disabled.

20. The completed document & integrity hash

When the last signer finishes, XRero Sign assembles a single **completed PDF** with every signature, initial, text, date and tick burned into the page. It also computes an **integrity hash** — a unique fingerprint of the file. If even one byte changes later, the hash won't match, proving the document hasn't been altered since signing.

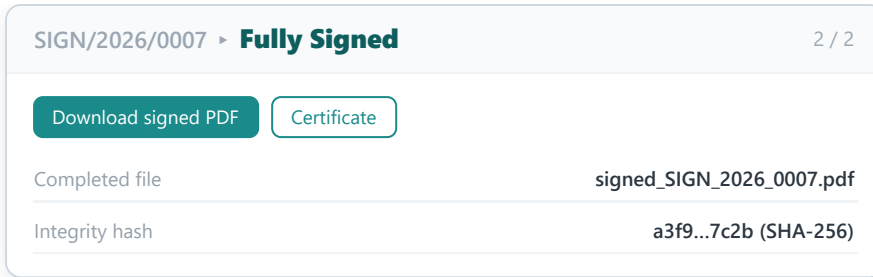


Figure 20.1 — The finished document with a download button and its tamper-evident integrity hash.

21. The signing certificate

Every request keeps a **log** of events — when it was sent, opened, signed and by whom, with timestamps. From this, XRero Sign produces a **signing certificate**: a one-page audit report you can download alongside the signed PDF as legal evidence of the signing.

Signing Certificate — SIGN/2026/0007		
EVENT	WHO	WHEN
Sent	Sender	2026-05-22 09:30
Opened	Ahmed Ali	2026-05-22 09:41
Signed	Ahmed Ali	2026-05-22 09:43
Signed	Sara Khan	2026-05-22 11:05

Figure 21.1 — The signing certificate: a timestamped audit trail of the whole signing.

22. Reports & dashboard

Menu path: XRero Sign ▶ Reports ▶ Signature Requests

The dashboard analyses your signing activity — how many requests are in each status, completion rates and turnaround. Group and filter to see, for example, how many contracts were fully signed this month.

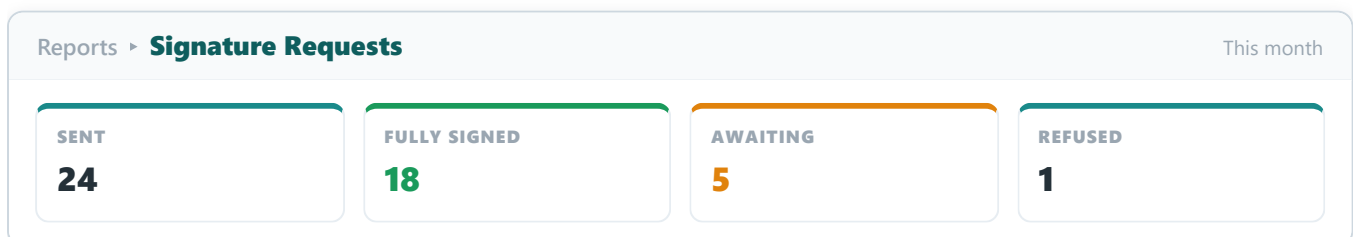


Figure 22.1 — The Signature Requests dashboard summarising activity for the period.

23. Security & access

Access is controlled by two groups. **XRero Sign / User** can create templates and send requests; **XRero Sign / Administrator** can additionally manage field types and signer roles in Configuration. **Signers are external** and reach only their own document through a unique, single-purpose link — they cannot see your other documents, your templates or any Xrero data. The link is tied to that signer's email, so forwarding it doesn't grant a stranger access to sign as them.



Settings > Users > Khalid (Admin)		Access Rights
XRero Sign		Administrator
Can send requests		✓
Can edit field types & roles		✓
Signer (external)		link only · no login

Figure 23.1 — Two access levels for staff; external signers reach only their own document by link.

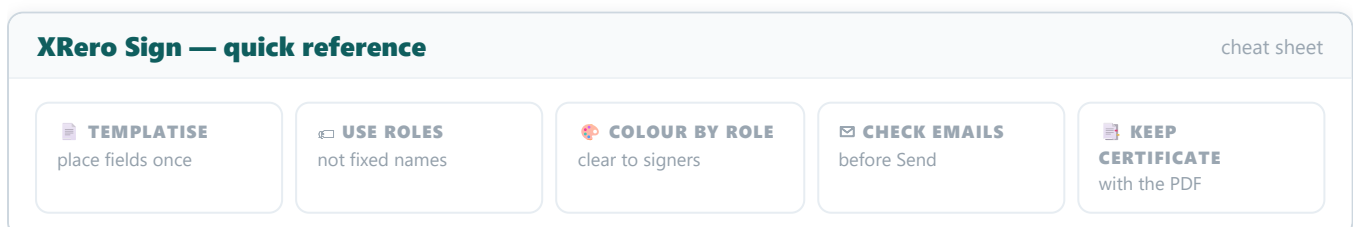
Keep the completed PDF and its certificate together — the integrity hash lets anyone confirm later that the file is unchanged. Completed documents and their audit log are retained on the request, so you always have a defensible record.

Privacy

Only send signing links to the correct email addresses, and store completed contracts where your records policy requires.

24. Tips & best practices

A few habits make signing fast and dispute-proof. The card below is a quick reference; the points beneath explain each one.



XRero Sign — quick reference cheat sheet

- TEMPLATISE**
place fields once
- USE ROLES**
not fixed names
- COLOUR BY ROLE**
clear to signers
- CHECK EMAILS**
before Send
- KEEP CERTIFICATE**
with the PDF

Figure 24.1 — The signing best-practice cheat sheet at a glance.

- **Templatise repeat documents** — place fields once and reuse; it saves time and avoids mistakes.
- **Use roles, not fixed names** — one template then serves every tenant, employee or vendor.

- **Colour fields by role** — signers instantly see what's theirs.
- **Double-check emails before Send** — the link goes straight to that address.
- **Keep the certificate** — download it with the signed PDF for your records.
- **Resend, don't recreate** — nudge slow signers with Resend rather than starting over.

25. Glossary

How the main objects fit together: a **template** carries **fields** assigned to **roles**; a **request** maps roles to real **signers**, who sign in the **portal**, producing a **completed document** with an **integrity hash** and a **certificate**.

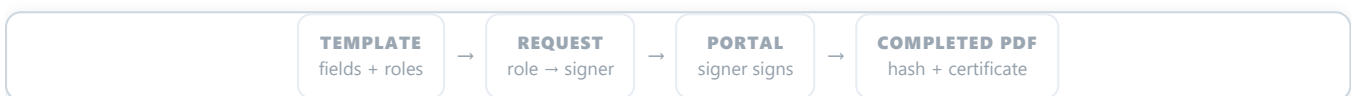


Figure 25.1 — How the glossary terms relate, end to end.

Term	Meaning
Template	A reusable PDF with fields already placed.
Request	One signing job sent to one or more signers.
Signer	A person who must sign (no Xrero account needed).
Field	A box to fill — signature, initial, text, date or checkbox.
Role	A label (Tenant, Landlord...) mapping fields to signers.
Portal	The browser page where a signer signs.
Completed document	The final signed PDF.
Integrity hash	A fingerprint proving the signed file is unaltered.
Signing certificate	The timestamped audit trail of the signing.

26. FAQ & troubleshooting

The quickest fixes for the issues we're asked about most:

Troubleshooting		common fixes
SYMPTOM	FIRST THING TO TRY	
Link doesn't open	Request not Cancelled? → Resend	
Signer can't sign	Confirm their email is correct	
Need a duplicate	Send again from the Template	
Prove it's unchanged	Keep hash + certificate	

Figure 26.1 — Common signing issues and the first fix to try.

Does the signer need an Xrero account?

No. They sign from the secure link you email them, on any browser.

Can I require more than one signer?

Yes — add as many signers as you need on the Signers tab; the request is "Fully Signed" only when all are done.

A signer says the link doesn't work.

Check the request isn't **Cancelled** (which disables links), confirm the email address, then click **Resend**.

How do I prove the document wasn't changed?

Keep the **integrity hash** and the **signing certificate**; together they show who signed, when, and that the file is unaltered.

Can I reuse a document?

Yes — save it as a **Template** with fields and roles, then create a new request from it each time.

A signer refused — what now?

The request becomes **Refused** with their reason. Fix the issue and send a fresh request.

Need help?

Contact your Xrero administrator or visit xrero.com.