

Osprey Approach: Setting up DocuSign Signature Anchors

This help guide was last updated on Dec 19th, 2023

The latest version is always online at https://support.ospreyapproach.com/?p=52895

Click here for a printer-friendly version



What are Signatures Anchors

Signature Anchors allow you to define where within documents the client should apply their digital signature when using DocuSign integration.

How to set up Signature Anchors

To set up Signature Anchors go to Supervisor > System settings and click Edit. Scroll down to the DocuSign Integration.

\leftarrow	С	🗇 https	://sales.ospre	yapproach.co	m/main/	ospreyHome.aspx?A	rea=0&Flag=	0										A [%] Q	to	£≞ @	3	
≡	EASTN	Osprey	Toda Toda	ry's Units: ry's Time: 000	0 n:00m	Global search		Q								Ō N/A		~	8	Θ	?	٩
@	0:	sprey Home	1000	y o Youte	20.00																	4
																						0
ណ	KEY	PERFORMAN	CE INDICAT	OR REPORTS	×																	0
<u></u>		et default 🕤	Refresh chart																			-
~~~	Ava	lable KPIs:	Fees B	lled	~																	+
I	Fee	Earner:	Dave D	ingle	~	I = Multi Select																
-	Cha	rt Type: « Labola:	Line	⊖ Bar																		
	Targ	et:	18500																			
	Sel	30000 25000 15000 5000 5000 0 December	r(s): Dave Din	Frees f	Billed 0500 0702 nth	This Year Last Year Target	18500 ember															
	MAT	TERS FOR RE	VIEW 🗸																			
	E	CLIENT	MATTER	MATTER	DESCRIPT	ION				REVIEW DAT	E 🕇	ТҮРЕ	PERIOD	LMD	TIME LM	SUP F/E	27					
	D	D D00019	10	CRIME: T	neft								14	05/07/2021	05/07/202	n •					*	Rafille

Osprey can map anchors for up to 5 signatories, and you can anchor the Signature, Full Name and Date. Docusign will use the specified text and allow clients to place their signature at this location.

### **Offset Anchors**

Whilst the signatures will be anchored to a text field, you may require the signature to appear with an offset, maybe on the line below, or further across the page. The offset values allow you to set how for horizontally or vertically away the signature will appear from the anchor text.

#### DOCUSIGN INTEGRATION

Select Signer:	Main Signer 🗸 🗸
Signature Anchor Text:	Sign here:
Signature Horizontal Offset (pixels):	20
Signature Vertical Offset (pixels):	20

In the above example, the main signauture will be placed 20 Pixels to the right, and 20 pixels lower from the Anchor Text "Sign Here:"

Sign Here:

Mr Signature Here