eForms: Sending to multiple contacts

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The Stages tab (on the customer detail page, eForms tab, click the eForm number hyperlink in the grid) allows an eForm to be sent to multiple individuals when a workflow needs to be followed.

Sometimes an eForm has more than one signature or other field that must be assigned to two contacts.

Below will guide you on how to add a second contact to receive the eForm for their signature.

1. Stages tab: When it is time to assign who signs which signature field, click the Stages tab to add another email and contact to sign one of the signature fields.

2. Click +Add Stage At Top to start adding the new contact.

3. Enter the following information:

   - **Stage Name**: The name of this stage.
   - **Subject**: The subject of the email going to this contact.
   - **Override Email Body**: Optionally, slide this to ON if you want a different email message for this stage.

   Click + Add Recipient to add one or more contacts for this step.

4. Enter the email and name of the contact; then click **OK**.

5. Click OK on the next screen.

6. Click Save to keep the stage.

7. Now you can assign the new contact to a signature field.