



Process Documentation

Department:

Customer Support

Last Updated:

8/29/2025 11:26 AM

NAME OF PROCESS

Requesting a Signature [MobileLink]

Use Case / Objectives

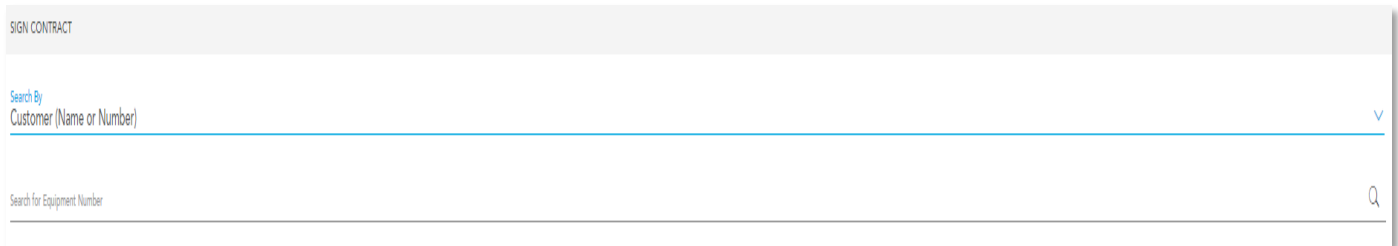
There are several ways to request a customer's signature in MobileLink. The following document will walk you through the process of requesting a signature on a contract using either the Customer (Name or Number), Equipment Number, or Contract Number.

Requesting a Signature in MobileLink

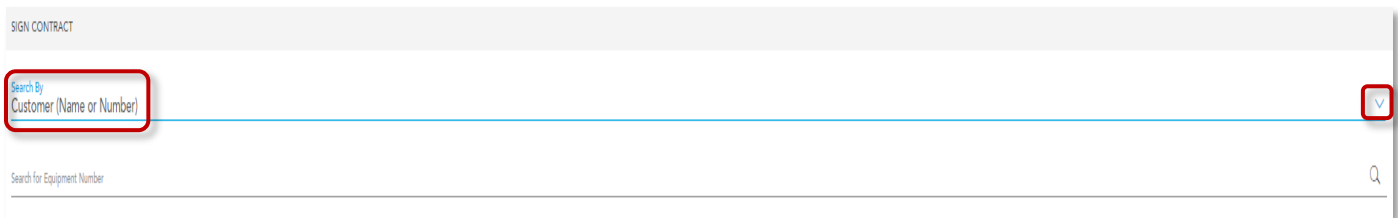
1. Log into the **MobileLink** application using your credentials.
2. On the home page, click on **Sign Documents**.



- a. The **Sign Contract** screen displays. On this screen you will be able to search via *Equipment Number*, *Customer Name or Number* or *Contract Number*.



3. Click on the drop-down arrow in the *Search By* field.



- a. A drop-down list opens, displaying the search options available.

SIGN CONTRACT

Search By
Customer (Name or Number)

Customer (Name or Number)

Contract(or Reservation) Number

Equipment Number


To Search by Customer (Name or Number)

4. Click on the **Customer (Name or Number)** in the list; otherwise, continue to the steps below for searching by **Contract Number** or **Equipment Number**.
 - a. The **Sign Contract** screen refreshes to display new search by criteria.

SIGN CONTRACT

Search By
Customer (Name or Number)

Search for Equipment Number

5. In the *Search for Customer (Name or Number)* field, type in all or part of the desired customer's information. Press enter or click on the search icon. 
 - a. The **Sign Contract** screen refreshes to display all options containing the value entered.

SIGN CONTRACT

Search By
Equipment Number

Search for Equipment Number
jeff

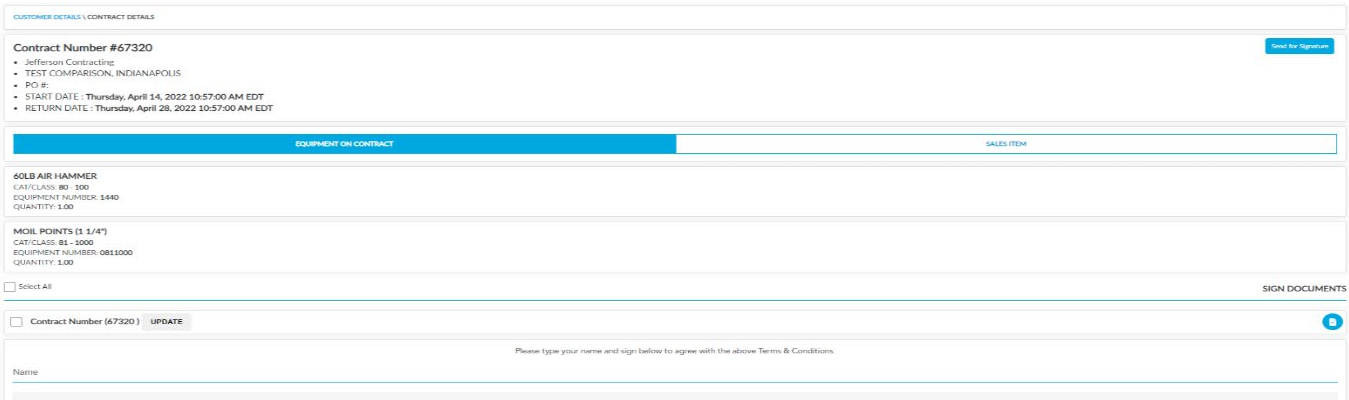
CUSTOMER DETAILS

Jeff Ioomi DL# CA 12983091283	>
Jeff Ioomis DL# BY 019283	>
Jeff Ioomis DL# IN JEFFLOOMIS	>
Jeff smith DL# HI 1231120938	>

6. Click on the desired customer.
 - a. The **Sign Contract/Customer** screen refreshes to display contracts for the selected customer.



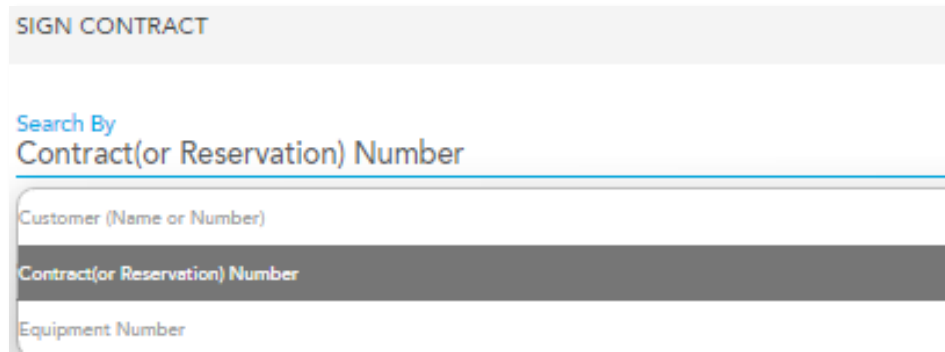
7. Click on the desired contract.
 - a. The **Customer Details/Contract Details** screen opens to display the details for the selected contract.



8. Continue to the [Send For Signature](#) section.

Search by Contract Number

1. Click on **Contract Number** in the list.



The screenshot shows the 'SIGN CONTRACT' interface. Under the heading 'Search By', there are three options: 'Contract(or Reservation) Number' (which is selected and highlighted in blue), 'Customer (Name or Number)', and 'Equipment Number'.

- a. The **Sign Contract** screen refreshes to display new search by criteria. **NOTE:** To search by the contract number, you will need to know the whole number, not a partial number.



This screenshot shows the 'SIGN CONTRACT' screen with 'Contract(or Reservation) Number' selected under 'Search By'. A search icon is visible in the bottom right corner.

2. If you know the full contract number, type it in the **Contract Number** field. Click on the **Search** icon.

- a. The **Sign Contract In** screen refreshes to display any results for the value entered.



The screenshot shows the 'SIGN CONTRACT' screen with 'Contract(or Reservation) Number' selected. The search field contains the text '67320'. Below the search field, the text 'CONTRACT/RESERVATION RESULTS' is displayed. The search results show 'CONTRACT #67320' and 'Jefferson Contracting'.

3. Click on the corresponding contract. **NOTE:** If you are unable to find the correct contract, you may need to find it using one of the other methods in this document.

- a. The **Customer Details/Contract Details** screen opens to display the details for the selected contract.

CUSTOMER DETAILS \ CONTRACT DETAILS

Contract Number #67320

- Jefferson Contracting
- TEST COMPARISON, INDIANAPOLIS
- P.O. #:
- START DATE : Thursday, April 14, 2022 10:57:00 AM EDT
- RETURN DATE : Thursday, April 28, 2022 10:57:00 AM EDT

[Send for signature](#)

EQUIPMENT ON CONTRACT	SALES ITEM
<p style="font-size: 0.7em; margin: 0;">60LB AIR HAMMER CAT/CLASS: 80 - 300 EQUIPMENT NUMBER: 1440 QUANTITY: 1.00</p>	
<p style="font-size: 0.7em; margin: 0;">MOIL POINTS (1 1/4") CAT/CLASS: 81 - 1000 EQUIPMENT NUMBER: 0811000 QUANTITY: 1.00</p>	

Select All
SIGN DOCUMENTS

Contract Number (67320) UPDATE

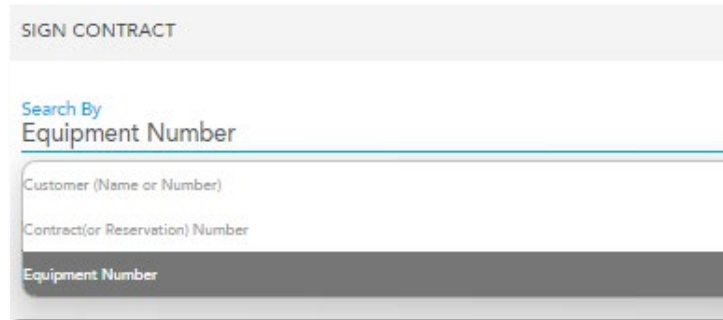
Please type your name and sign below to agree with the above Terms & Conditions.

Name _____

4. Continue to the [Send For Signature](#) section.

To search by Equipment Number

1. Click on **Equipment Number** in the list.



SIGN CONTRACT

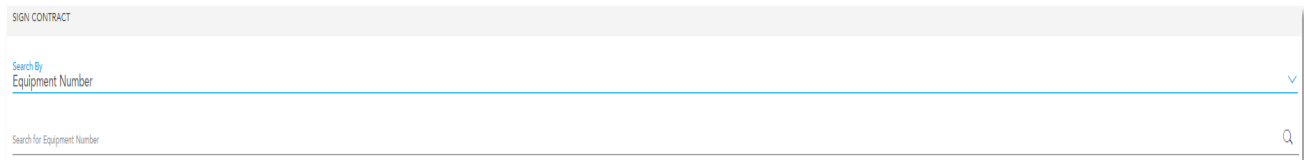
Search By
Equipment Number

Customer (Name or Number)

Contract(or Reservation) Number

Equipment Number

- a. The **Sign Contract** screen refreshes to display new search by criteria. **NOTE:** To search by the equipment number, you will need to know the whole number, not a partial number.

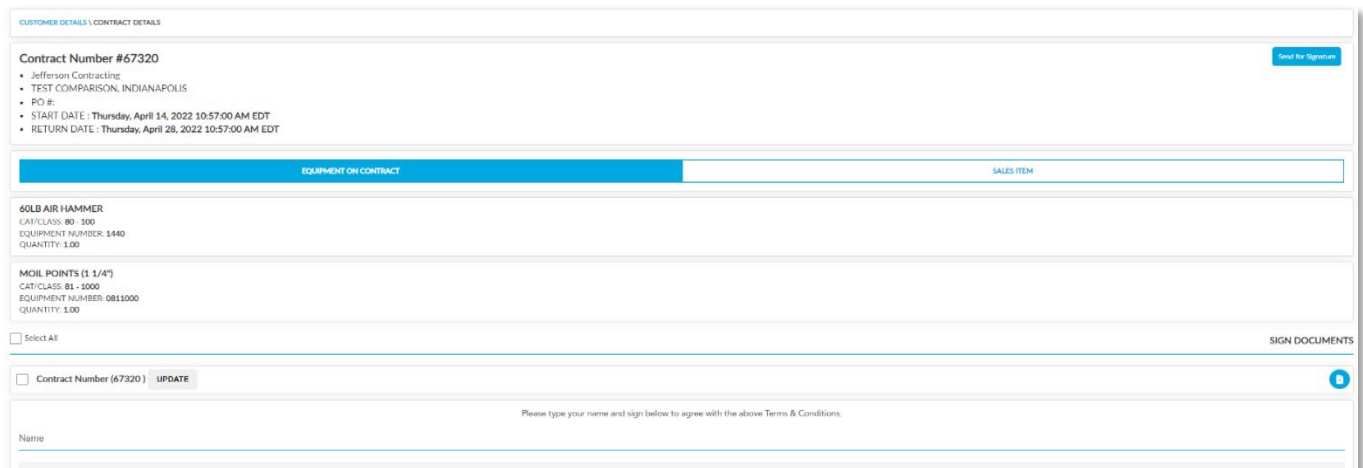


SIGN CONTRACT

Search By
Equipment Number

Search for Equipment Number

2. Enter the equipment number in the *Equipment Number* field; click the **Search** icon.
 - b. The **Customer Details/Contract Details** screen opens to display the details for the entered equipment number.



CUSTOMER DETAILS / CONTRACT DETAILS

Contract Number #67320 [Send For Signature](#)

- Jefferson Contracting
- TEST COMPARISON, INDIANAPOLIS
- PO #:
- START DATE: Thursday, April 14, 2022 10:57:00 AM EDT
- RETURN DATE: Thursday, April 28, 2022 10:57:00 AM EDT

EQUIPMENT ON CONTRACT	SALES ITEM
50LB AIR HAMMER CAT/CLASS: 80 - 100 EQUIPMENT NUMBER: 1440 QUANTITY: 1.00	
MOIL POINTS (3 1/4") CAT/CLASS: 81 - 1000 EQUIPMENT NUMBER: 0811000 QUANTITY: 1.00	

Select All SIGN DOCUMENTS

Contract Number (67320) [UPDATE](#)

Please type your name and sign below to agree with the above Terms & Conditions.

Name _____

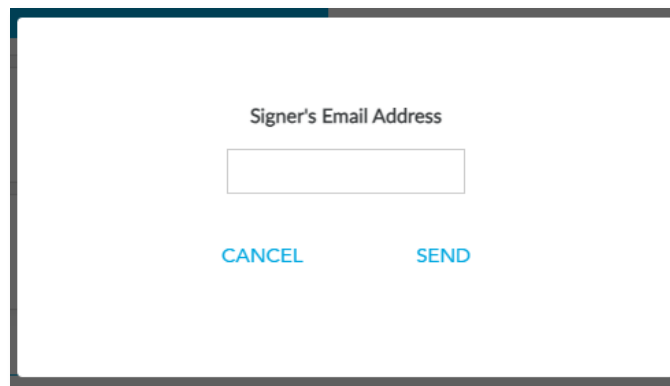
3. Continue to the [Send For Signature](#) section.

Send for Signature

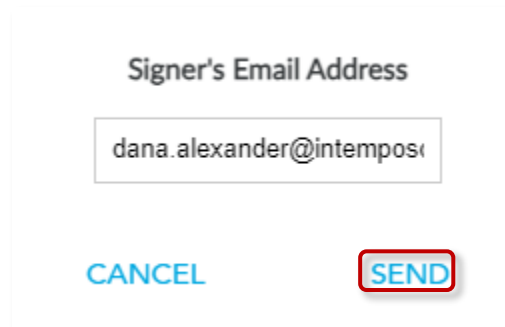
1. Click on the **Send for Signature** button.



- a. The **Signer's Email Address** pop-up window opens.



2. Enter the email address of the person whose signature is requested in the *Email Address* field and click on the **Send** button.



- a. An email is sent to the customer's email address. This email will contain a link directing them to the **Contract Signing Page**.