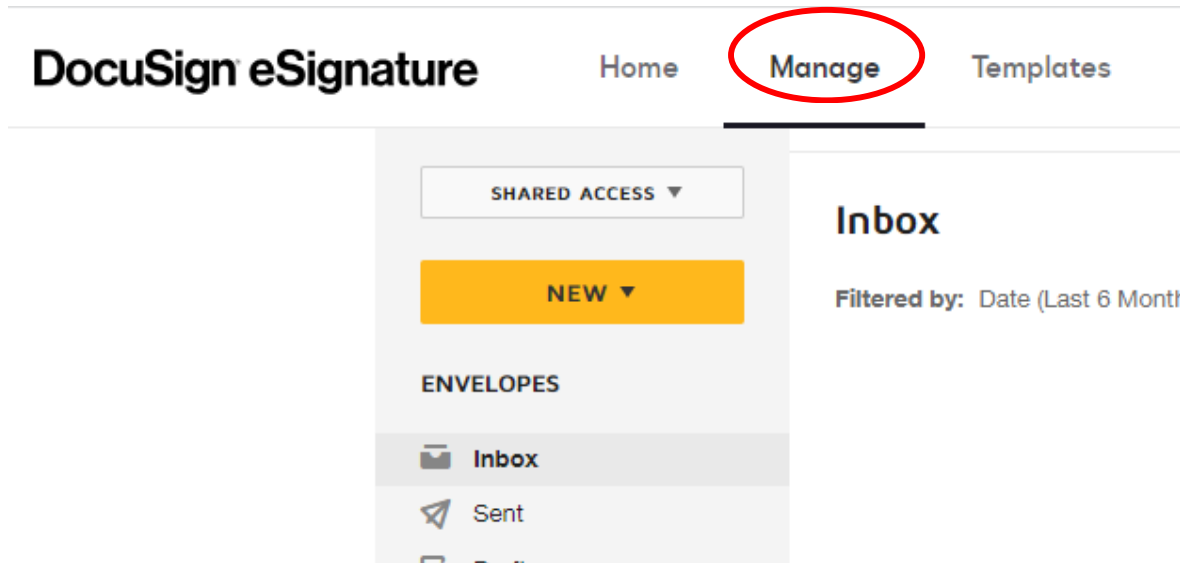


Sending Documentation

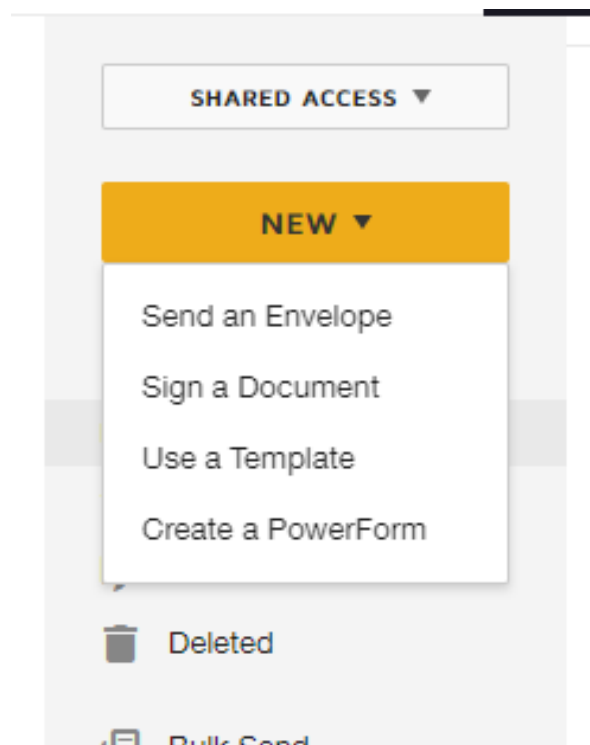
1- Upload Document(s)

- Click on the “Manage” tab



2- Upload Document(s)

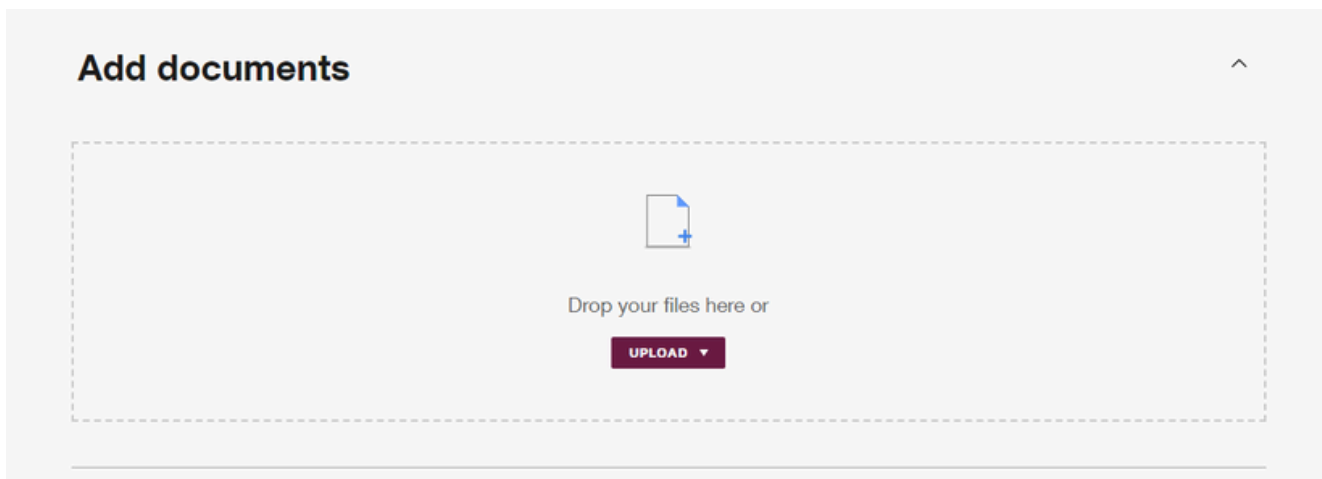
- Click on the “NEW” button on the upper left-hand side of the screen
- Click “Send an Envelope”



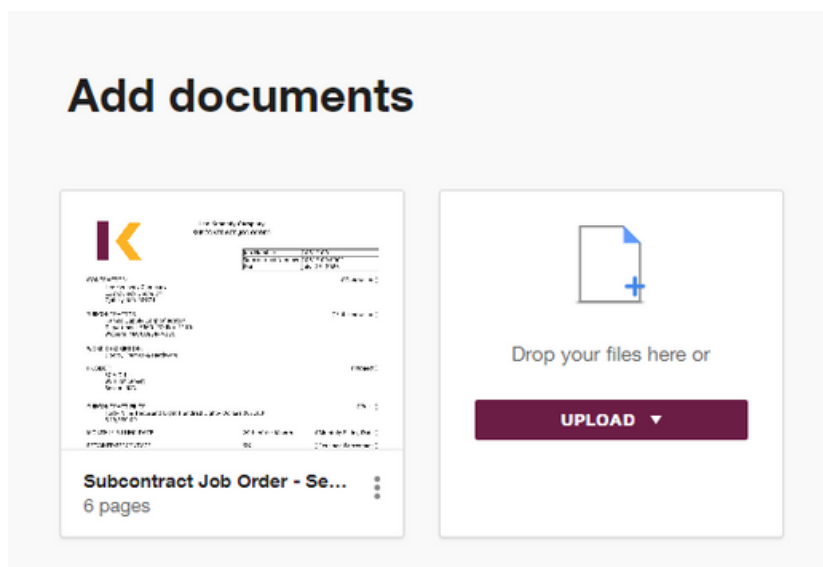
Sending Documentation

3- Upload Document(s)

- Upload documents to the envelope by:
 - Dragging and dropping the file into the white box labeled “DROP FILE HERE”
 - Click the “Upload” button and select the file



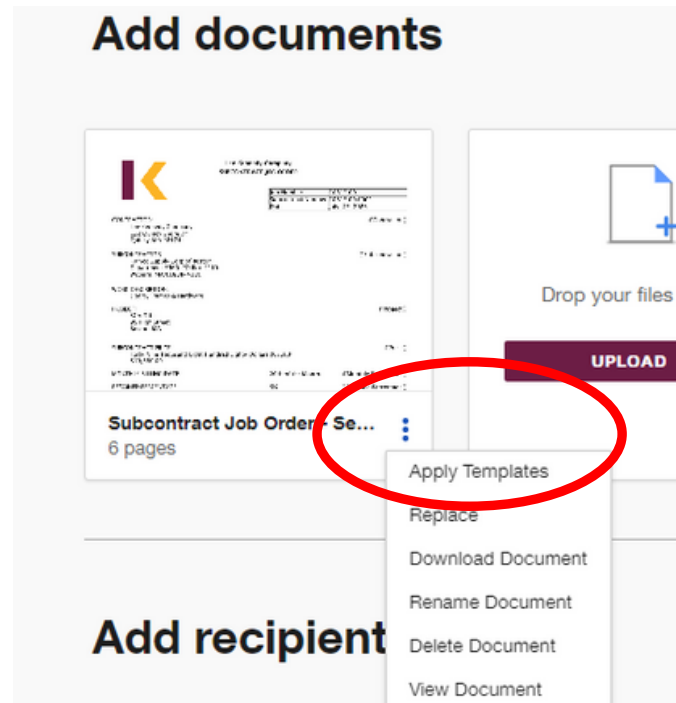
- Once you have uploaded the document, you will see it under the “Add Documents” section



Sending Documentation

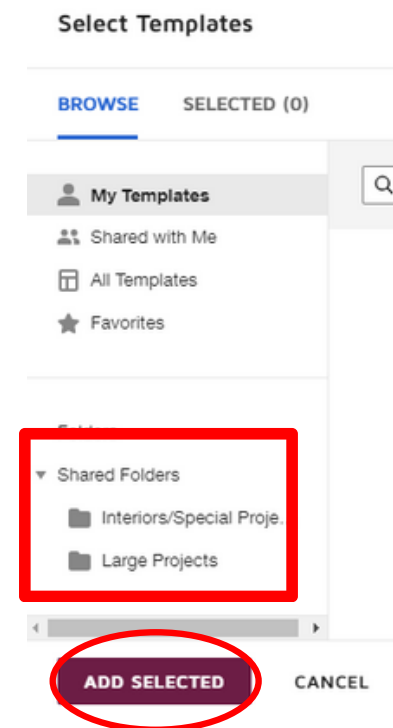
4- Apply Template(s)

- Click on the 3 vertical dots at the bottom right-hand side of the document
- Click “Apply Templates”



5- Apply Template(s)

- A new window will appear, click “Shared Folders” on the left-hand tree view
- Choose:
 - Interiors/Special Projects
 - Large Projects
- Click “ADD SELECTED”



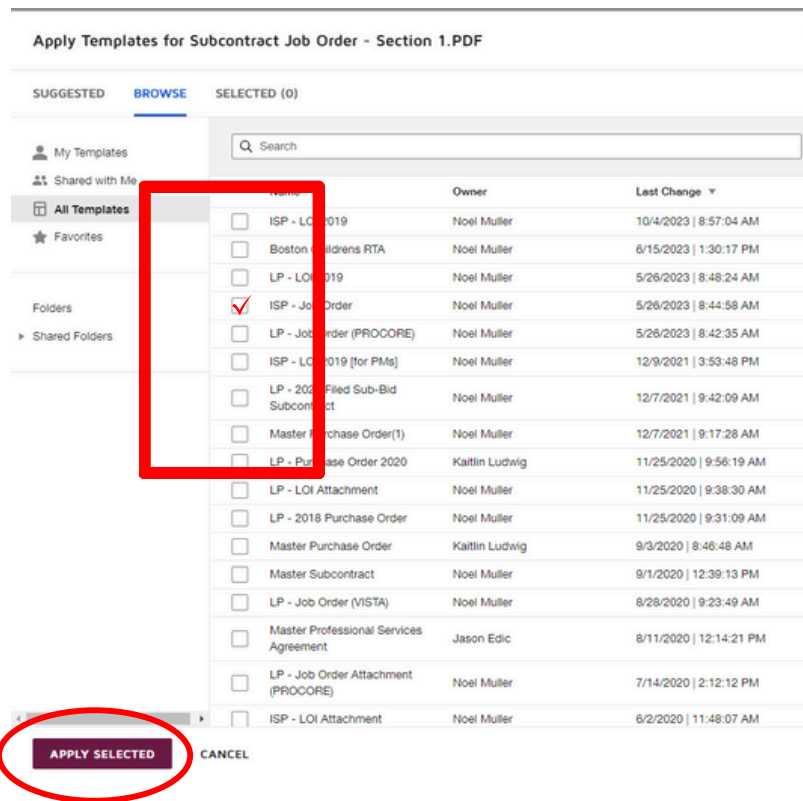
Sending Documentation

6- Apply Template(s)

***All of the template options will appear. They are named accordingly with the document to which they apply.**

- **Click the checkbox next to the appropriate template**

- **Click “Apply Selected”**



- **Repeat this step for all documents in the envelope**

Sending Documentation

7- Fill in the rest and send

- Under “Add recipients” input the names and emails of all the recipients

***NOTE- Some fields will autofill**

The screenshot shows the 'Add recipients' interface. At the top, there are options for 'Set signing order' (checked), 'View', 'Bulk send', and a 'NEW' button. Below this, there are two recipient entries. The first entry is for an 'Estimator' with a 'NEEDS TO SIGN' status. The 'Name' and 'Email' fields for this entry are circled in red. The second entry is for an 'Executive Project Assistant' with a 'CC RECEIVES A COPY' status. The 'Name' field for this entry is pre-filled with 'Cathy Pasquantonio' and the 'Email' field is pre-filled with 'cpasquantonio@leekennedy.com'.

8-Fill in the rest and send

- Scroll down to “Add message”
- Enter the “Email Subject”
 - ***The program will only search the subject of the email. Be aware of this as you are naming the email subject, as it will help you find your envelopes later**

The screenshot shows the 'Add message' interface. At the top, there is a checkbox for 'Custom email and language for each recipient' which is unchecked. Below this, the 'Email Subject' field is circled in red and contains the text 'Lee Kennedy Company Master Purchase Order'. Below the subject field, it says 'Characters remaining: 59'. The 'Email Message' field contains the text 'Attached you will find Lee Kennedy Company's Master Purchase Order for your review and execution. Please sign and return as soon as possible. Thank you!'. Below the message field, it says 'Characters remaining: 9848'.

Sending Documentation

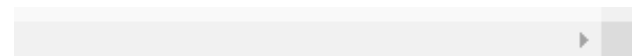
9- Fill in the rest and send

- **Private messages are automatically applied to recipients as part of the template, so no email message is necessary**

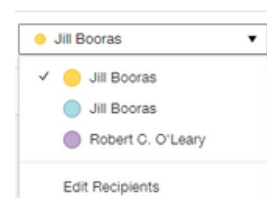
The screenshot shows a form titled "Add message" with a close button in the top right. It includes a checkbox for "Custom email and language for each recipient". Below is the "Email Subject *" field containing "Lee Kennedy Company Master Purchase Order" with "Characters remaining: 59". The "Email Message" field, which is circled in red, contains the text: "Attached you will find Lee Kennedy Company's Master Purchase Order for your review and execution. Please sign and return as soon as possible. Thank you!". Below this field, it says "Characters remaining: 9848".

10-Fill in the rest and send

- **Click "NEXT" in the bottom right-hand corner to preview the document**



***NOTE- in the top left-hand corner, the recipient is listed with a color code. This allows you to see where in the document they should sign**



Sending Documentation

11- Fill in the rest and send

- Click the yellow “Send” button in the bottom right-hand side of the page

