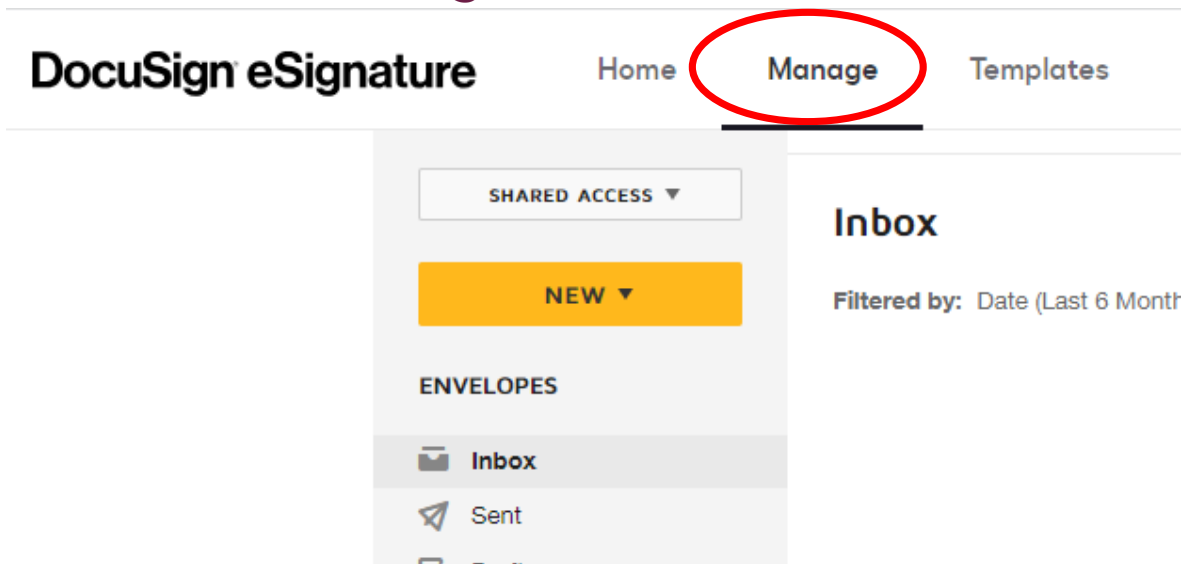


Track Documents

1

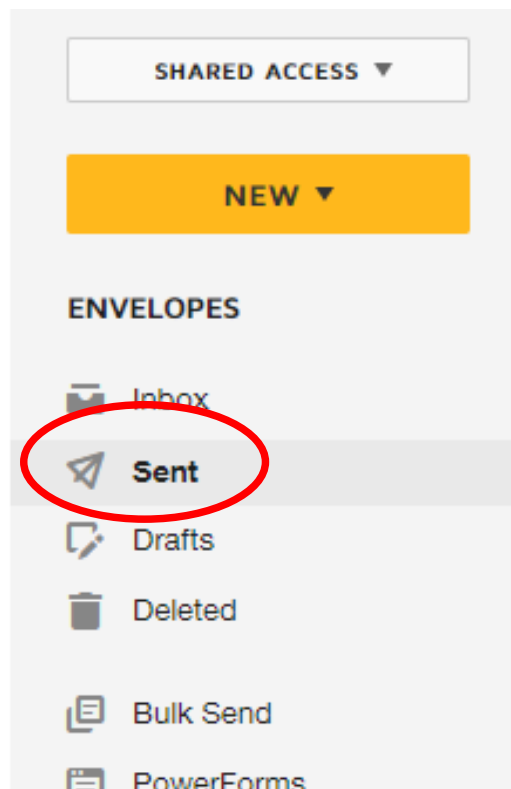
- Click on the “Manage” tab



***This will default you to your inbox.**

2

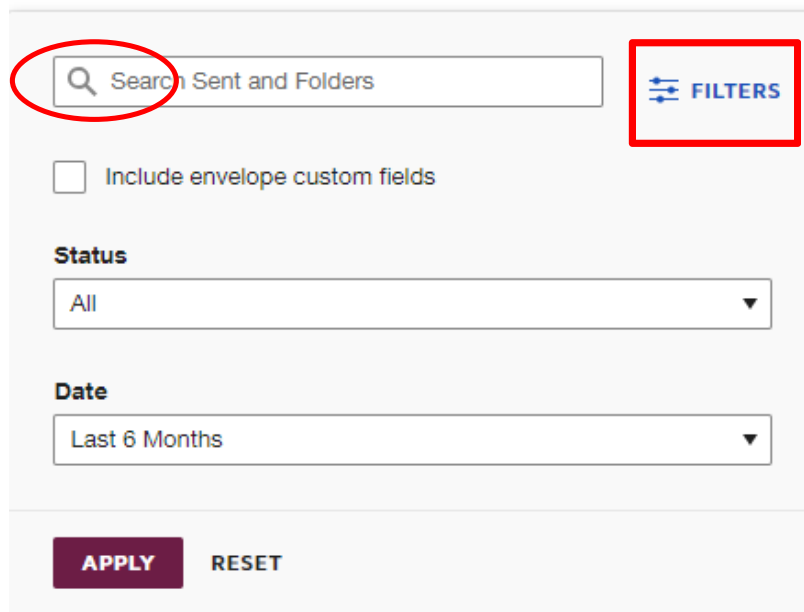
- Click the “Sent” button on the left-hand side of the screen to see all of the envelopes that you have sent



Track Documents

3

- To filter, click on “Filters” in the upper-right-hand corner
- Click “Search Sent and Folders”
- Click “Apply”



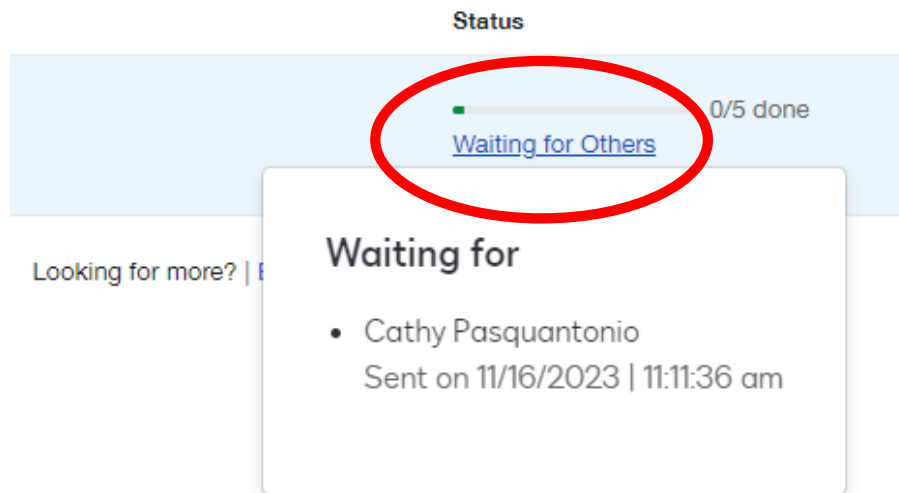
The screenshot displays a user interface for tracking documents. At the top, there is a search bar with a magnifying glass icon and the text "Search Sent and Folders", which is circled in red. To the right of the search bar is a "FILTERS" button with a blue filter icon, also circled in red. Below the search bar is a checkbox labeled "Include envelope custom fields". Underneath, there are two dropdown menus: "Status" with "All" selected, and "Date" with "Last 6 Months" selected. At the bottom of the form are two buttons: "APPLY" (highlighted in dark purple) and "RESET".

***From here you can search for any name/number included in the subject line, filter by the status of the envelope, and/or filter by date**

Track Documents

4

- **Hover over the “Waiting for Others” status on an envelope to see whom the envelope is currently waiting for a signature from**



Track Documents

4

- Click anywhere on the envelope listing. This will open a new screen with just that envelope.


Information includes:

- Who has already signed the envelope and what date/time they did
- Who the envelope is with currently, if they viewed it, and what time/date they did
- Who is waiting to receive the envelope

Sent


Filtered by: Date (Last 6 Months) | [Edit](#)






Subject

 **This is a test to be used for training purposes**
To: Cathy Pasquantonio, Jill Booras
[+3 more](#)

Recipients

CURRENT

 SIGNING ORDER

1	Cathy Pasquantonio cpasquantonio@leekennedy.com	 Needs to Sign Sent on 1/16/2023 11:11:36 am
2	Jill Booras jbooras@leekennedy.com	 Needs to Sign
3	Jill Booras jbooras@leekennedy.com	 Needs to Sign
4	Jill Booras jbooras@leekennedy.com	 Needs to Sign
6	Jill Booras jbooras@leekennedy.com Private Message: Attached is your Subcontract Agreement. Please review and have an Authorized Individual sign the document as soon as possible. An electronic copy will be sent to you after final execution for your records Also, please ensure that a current, job specific insurance certificate is on file with Lee Kennedy Company, as no one is allowed on the jobsite without the proper insurance on file at our office.	 Needs to Sign