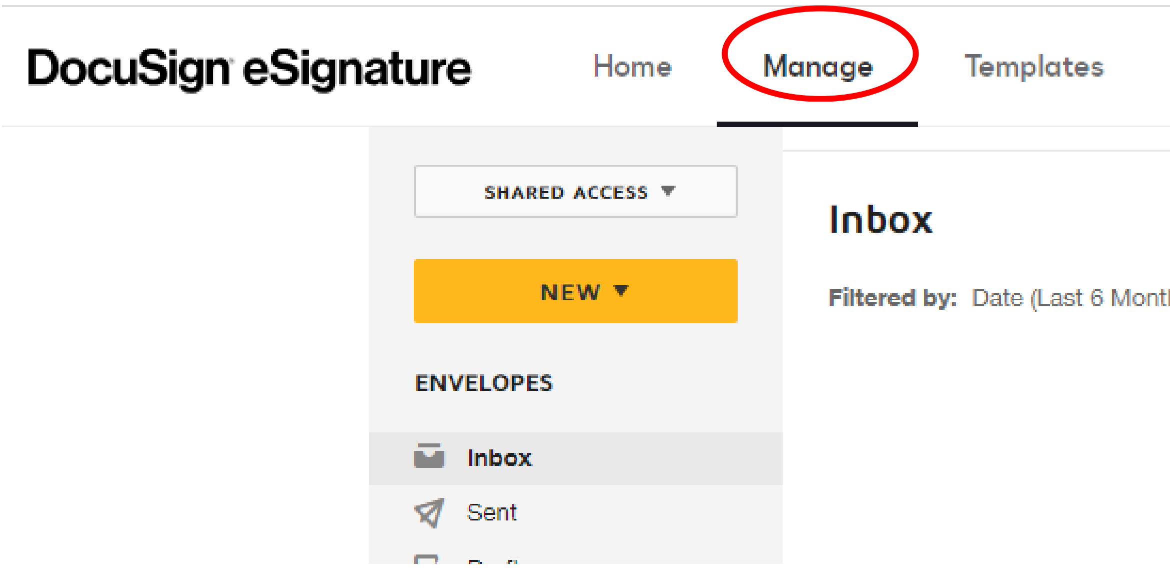
Sending Documentation

1- Upload Document(s)

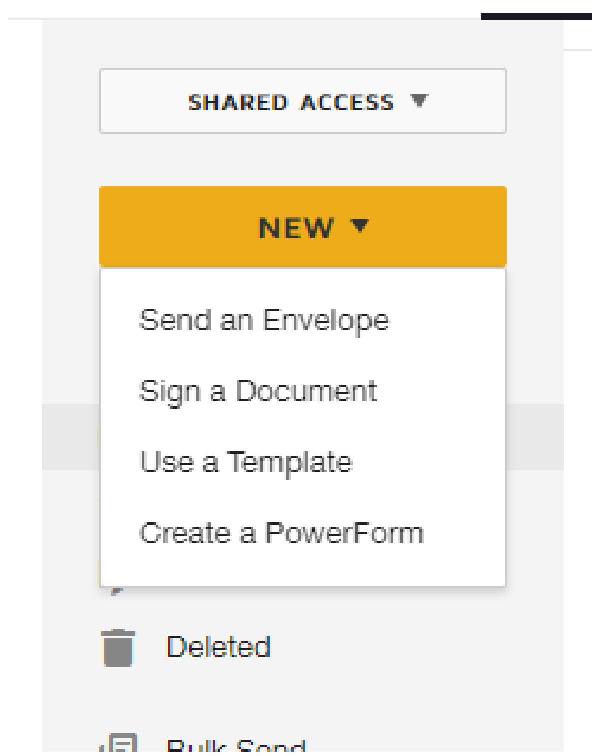
- Click on the “Manage” tab



2- Upload Document(s)

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

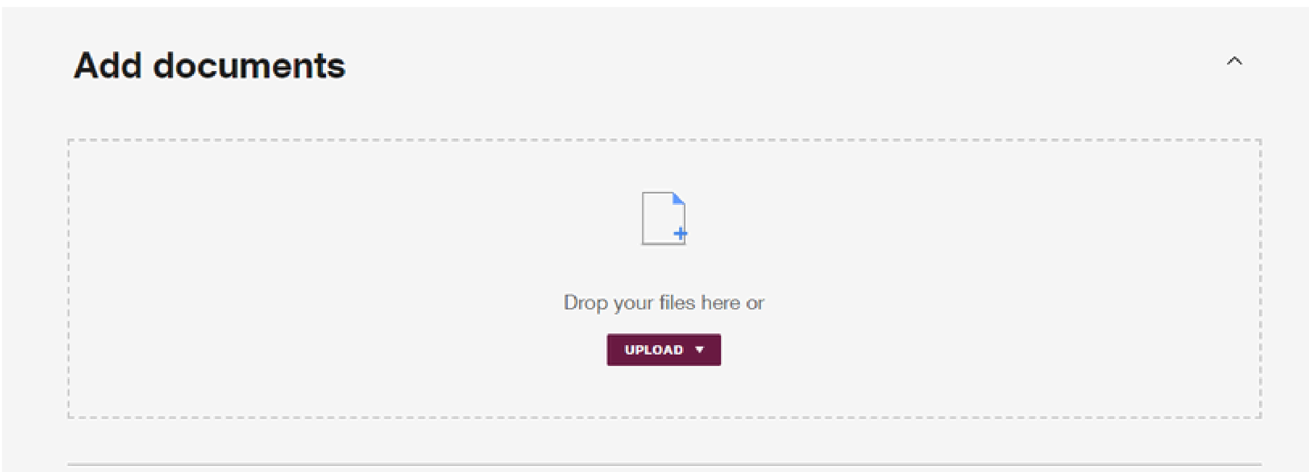
- Click “Send an Envelope”



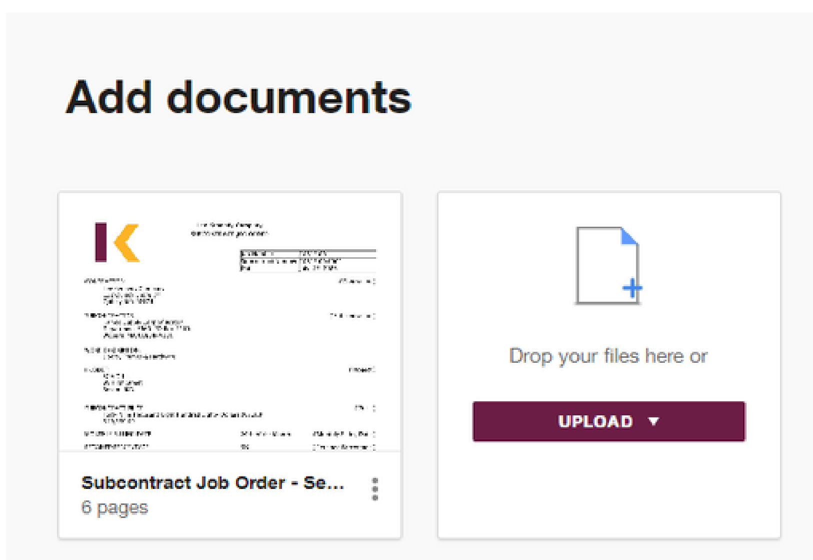
Sending Documentation

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

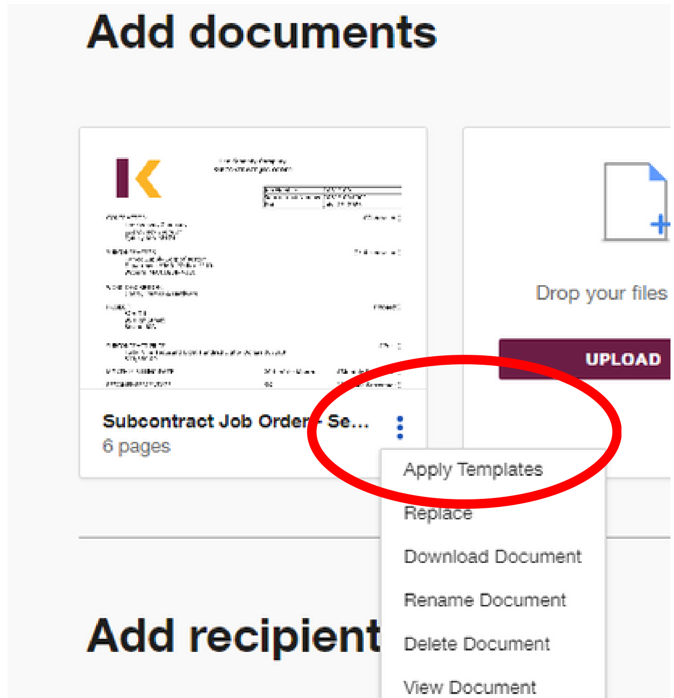


Sending Documentation

4- Apply Template(s)

- Click on the 3 vertical dots at the bottom right-hand side of the document

- Click “Apply Templates”

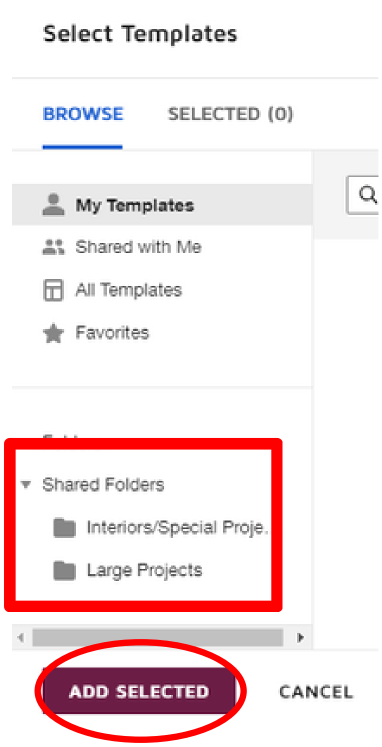


5- Apply Template(s)

- A new window will appear, click “Shared Folders” on the left-hand tree view

- Choose:
  - Interiors/Special Projects
  - Large Projects

- Click “ADD SELECTED”



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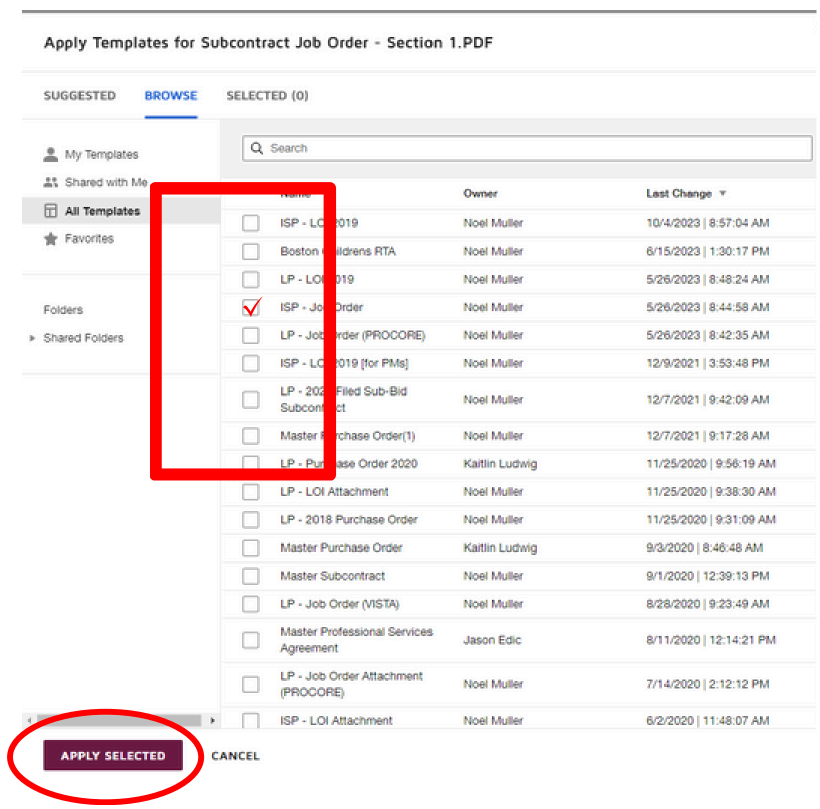
6- Apply Template(s)

***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"**



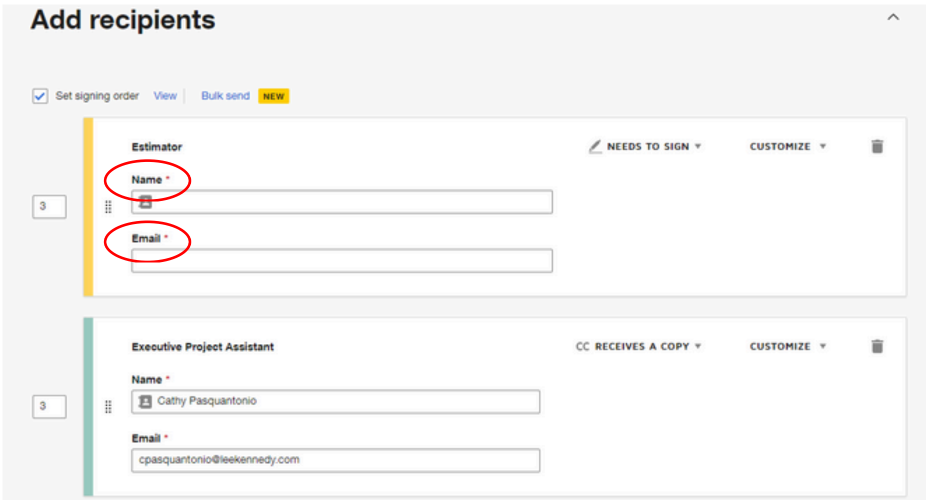
- **Repeat this step for all documents in the envelope**

Sending Documentation

7- Fill in the rest and send

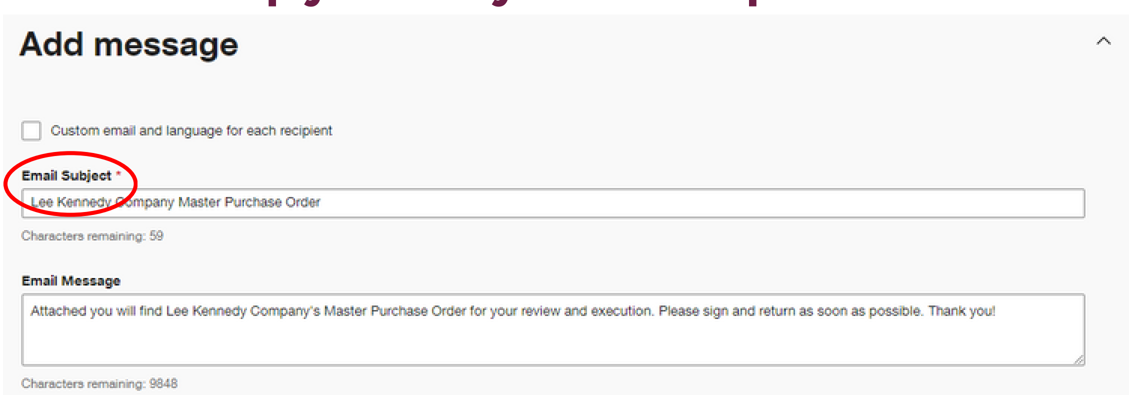
- Under "Add recipients" input the names and emails of all the recipients

*NOTE- Some fields will autofill



8-Fill in the rest and send

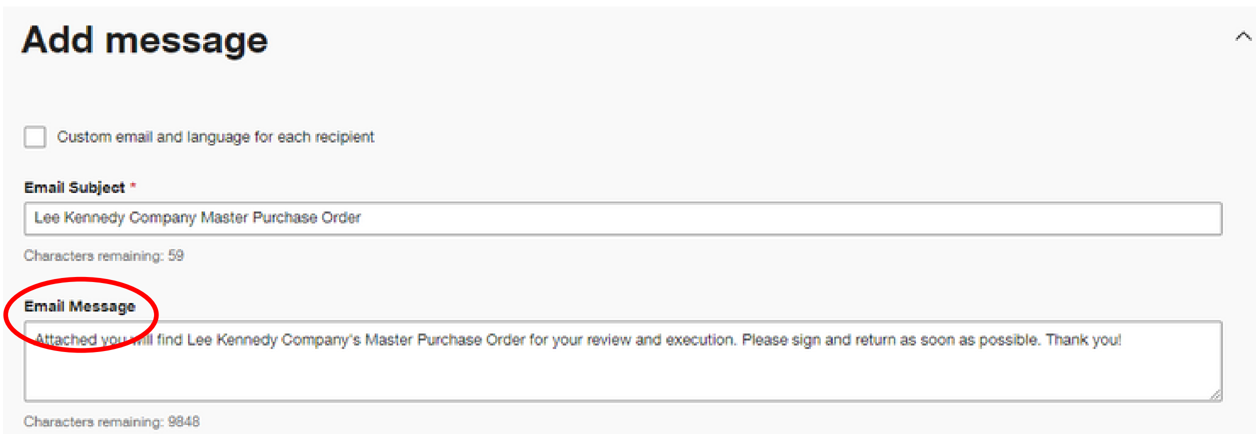
- Scroll down to "Add message"
- Enter the "Email Subject"
  - *The program will only search the subject of the email. Be aware of this as you are naming the email subject, as it will help you find your envelopes later



Sending Documentation

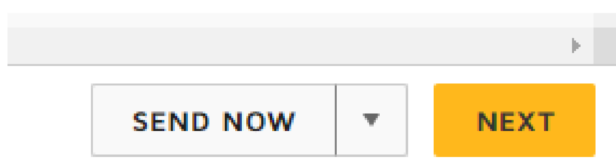
9- Fill in the rest and send

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

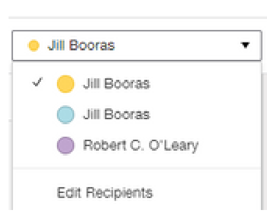


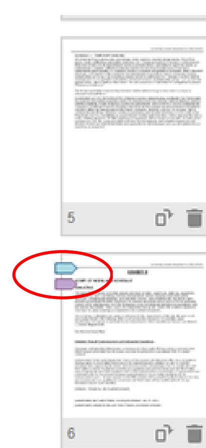
10-Fill in the rest and send

- **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