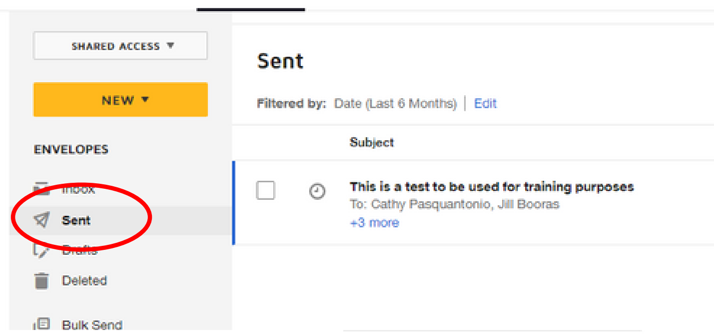
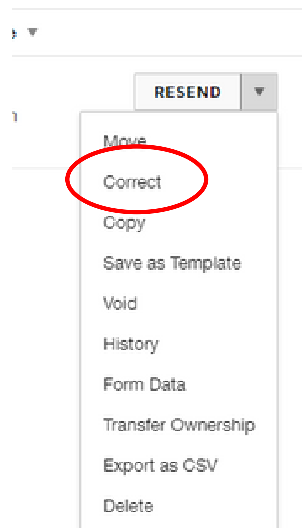
FAQs

Why can't I find the envelope that I just sent?

- You are defaulted to your inbox when you go to the manage section. If the workflow has not reached your role yet, it will not show up in your inbox. You must select the sent items to see all the envelopes you have sent.

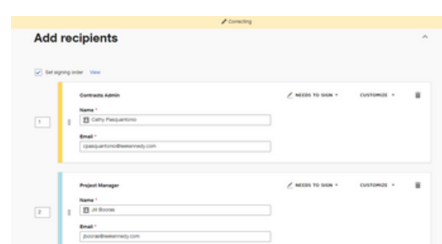


The subcontractor contact is not the correct contact, what should I do?



- While you can select an envelope, click correct, and update information such as email addresses for non-completed roles, you should only do that if the person is no longer at the company OR if the email address was entered incorrectly.

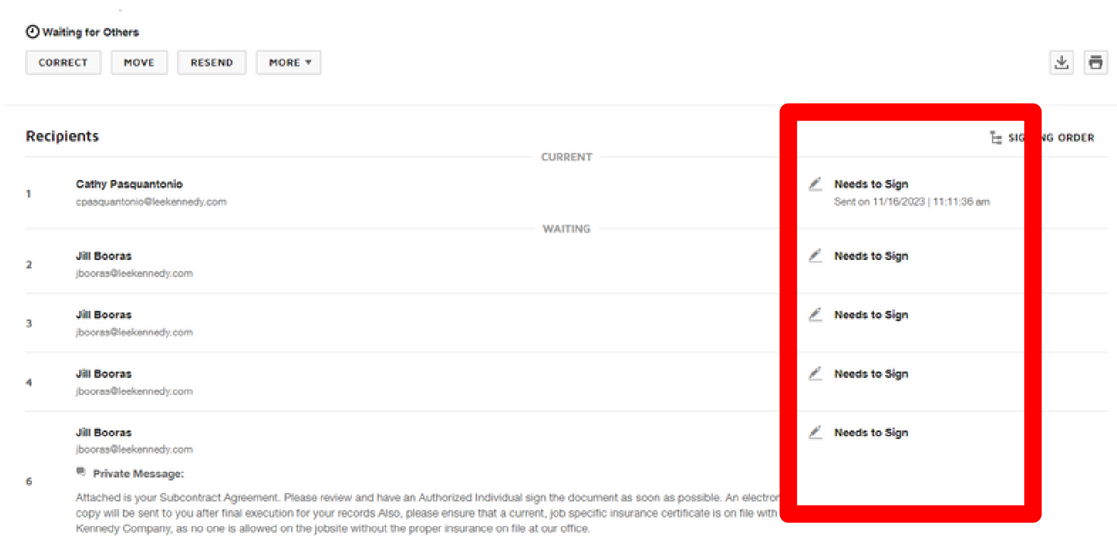
- If the envelope was received but the person isn't the correct signer, we recommend that they manage to reassign the envelope on their end by clicking on "Other Actions" from within the envelope and selecting "Assign to Someone Else" Then they will be able to enter the correct person's information and will still receive a copy of the fully executed document once it's completed.



FAQs

My envelope is not complete yet, how do I see who it's waiting on?

- From your sent items, click on the envelope to open it. From the envelope screen, you can see who has completed the envelope, who it's waiting on, and who's yet to receive it. It will also show you when it was sent to the recipient as well as if they've viewed it, but not completed it.



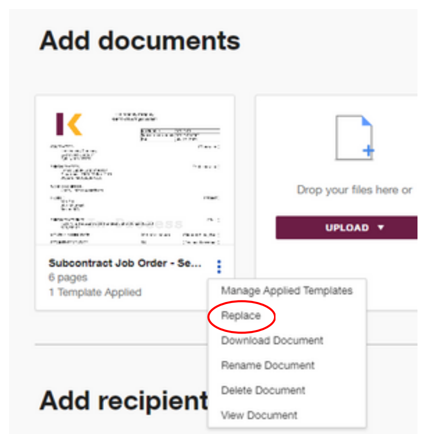
Someone declined my envelope, what do I do now?

- When someone declines an envelope, they need to give a reason. You will have to recreate the envelope with a new, corrected document (that addresses whatever the issue that prompted the decline) and start the review/signing process all over again.

FAQs

There's something wrong with the document in the envelope, how do I fix it?

- If nobody has signed off on the envelope yet, you can swap out existing documents for a new, corrected document. From your sent items, click on the envelope to open it. From the envelope screen, click on the "Correct button". Once the correcting screen opens, click on the three dots button on the document and select "Replace". You are now able to navigate to and select the correct document. The template that was previously applied to the envelope will remain, so there is no need to re-apply a template after swapping out the documents



- If someone has signed off on the envelope, you will need to void the envelope and start from scratch. This can be done by clicking the drop-down menu to the right of the envelope in the inbox and selecting "void". The system will prompt you for a reason for voiding the envelope, this reason will be emailed out to all recipients that already signed. So not delete the envelope, voiding the envelope is sufficient.