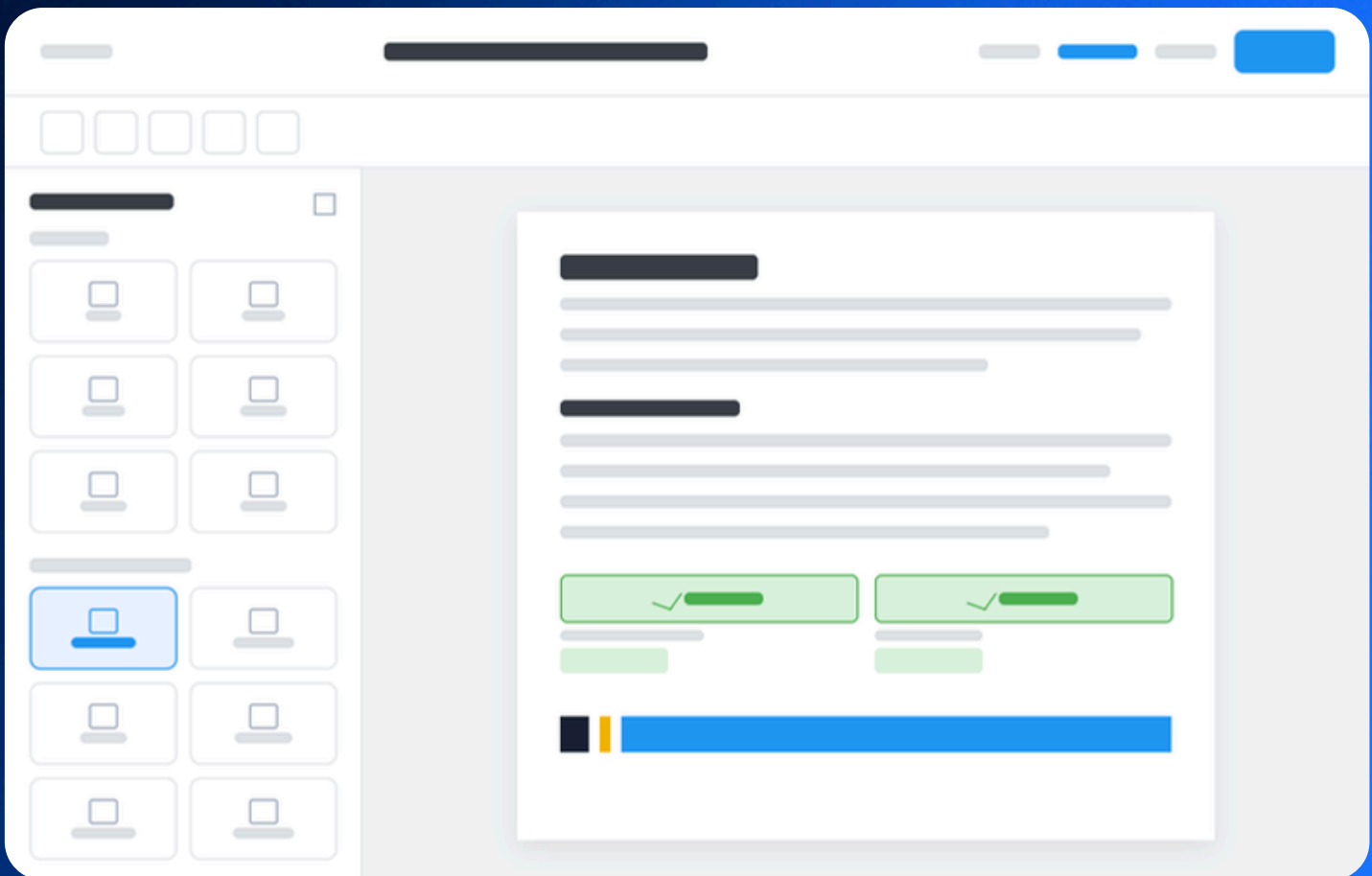


REFERENCE GUIDE

Documents & Contracts

Everything about signing in one place



Status Tabs and the Document List

What It Is

Search for Documents & Contracts. Status tabs sort every document by where it stands, and each row shows the key facts so you can read the list at a glance.

How It Works For Your Business

- Search for Documents & Contracts. Tabs include Draft, Waiting for others, Completed, Payments, and Archived.
- Draft holds unsent work. Waiting for others holds sent documents that still need a signature.
- Completed holds fully signed documents. Payments shows documents that have a payment attached.
- Rows show title, status, customer, date modified, and value, which is the dollar amount.
- Use the date filter to narrow the list to a time frame, like this month.

Status Tabs and the Document List – Tips & Guidelines

Tips

- Check Waiting for others when a client goes quiet.
- Archive old records to keep your main list clean.
- Read across the row before you open a document.
- Empty tabs are normal when you are new.

DO

- Check Waiting tab often
- Use the date filter
- Archive finished work
- Read each row's status

DON'T

- Leave unsent drafts forgotten
- Delete when you can archive
- Assume empty means broken
- Skip the value column

Starting a New Document

What It Is

The New button gives you three ways to begin. Pick the one that matches what you have in hand: a blank page, an existing PDF, or a ready-made template.

How It Works For Your Business

- Click New in the top corner to see the three choices.
- New Document opens a blank page in the editor. Use it for proposals or contracts from scratch.
- Upload Existing PDF lets you bring in a contract a lawyer wrote and add signature fields on top.
- Import from Template Library lets you grab a ready-made template instead of starting from zero.
- The Templates tab and the Settings button sit next to the status tabs, one click away.

Starting a New Document – Tips & Guidelines

Tips

- Use a PDF when the wording is already final.
- Use a template for anything you send often.
- Look in Templates before building from scratch.
- Open Settings once to see what you can control.

DO

- Match the method to what you have
- Upload PDFs you already have
- Reuse templates
- Peek at Settings early

DON'T

- Retype a PDF from scratch
- Rebuild the same contract
- Ignore the Templates tab
- Start before choosing a method

The Editor and Its Elements

What It Is

The editor is a drag-and-drop page builder. You name the document, drag building blocks onto the page, format text, and save as you go.

How It Works For Your Business

- Click the title at the top and give the document a name you will recognize later.
- The element toolbar has Text, Image, Video, Table, and Page Break. Drag each one where you want it.
- Click inside a Text block to type. Select words and look for the formatting bar to resize, bold, align, or link.
- Drag an element beside another to make split columns. Drop closer to the edge if it does not snap.
- Click Save often. The three-dot menu has Clone, a quick copy, and Convert to Template, a master version.

The Editor and Its Elements – Tips & Guidelines

Tips

- Use one Text block per idea for easy moving.
- Pair a logo with contact info using split columns.
- Use Page Break before a big section.
- Write short paragraphs in plain words.

DO

- Name it clearly
- Save as you go
- Use Clone for small changes
- Drop in a Table for scope

DON'T

- Leave it named Untitled
- Type everything in one block
- Skip saving
- Overthink the first layout

Signature and Fillable Fields

What It Is

Fields turn a plain page into a signable agreement. Each field has an owner and can be required or optional.

How It Works For Your Business

- Drag Signature, Initials, Text Field, Date, and Checkbox from the editor onto the page.
- Put the signature at the end, initials next to big items, and checkboxes where you need a clear yes.
- Click a field and find the setting that says who it is to be signed by. Pick the client or a team member.
- Look for the toggle that makes a field required or optional. Make signature and date required.
- Use the preview to see what your signer sees, then save.

Signature and Fillable Fields – Tips & Guidelines

Tips

- A field with no owner can leave a document stuck.
- Optional fits comments and notes.
- Fewer fields means more signed documents.
- Preview on your own before sending.

DO

- Assign every field
- Require signature and date
- Use checkboxes for agreements
- Preview before you send

DON'T

- Leave a field without an owner
- Add fields you do not need
- Skip the preview
- Make comment boxes required

Product Lists and Payments

What It Is

A product list pulls in your real products and totals them automatically. Payment settings decide how the money is collected.

How It Works For Your Business

- Drag the Product List element onto the page, then add items from the products in your account.
- If a product has more than one price, pick the one you want. One-time and recurring prices are recognized.
- Turn on the optional switch so the signer can check or uncheck an item. Quantity can be editable within limits.
- Recurring items let you set when billing starts, how often it repeats, and when it ends.
- Payment settings offer collecting on signing or an invoice, plus autopay. A connected payment processor is needed.

Product Lists and Payments – Tips & Guidelines

Tips

- Create products before you build the list.
- Use optional items for add-ons.
- One-time-only picks give a one-time invoice.
- Test with test products or test mode.

DO

- Pull prices from products
- Use optional add-ons
- Check the total in preview
- Connect a processor first

DON'T

- Type prices by hand
- Forget to save the settings
- Guess at recurring dates
- Test with real clients

Sending and Signing

What It Is

Sending is a short flow: add the recipient, choose email or link, and send. Your signer needs no account, and the finished document lands in Completed.

How It Works For Your Business

- Open the recipients area and add the contact. They need an email address saved in your account.
- Make sure each field is set to be signed by that person, then click Send.
- Send via Email lets you pick an email template and edit the subject and message. Share via Link gives a link to paste.
- Signers open the link, fill fields, draw or type a signature, submit, and see a confirmation.
- The document moves to Completed. Look for Download in the three-dot menu to save the signed PDF.

Sending and Signing – Tips & Guidelines

Tips

- Send a test to yourself first.
- Double check the email address.
- Refresh if status is slow to change.
- Keep your email message short and friendly.

DO

- Send a test to yourself
- Check the email address
- Use a link for texts
- Refresh before worrying

DON'T

- Send without testing
- Skip the field owner check
- Write a long email
- Assume it failed after a minute

Templates and the Content Library

What It Is

A template is a master version of a document you reuse. The Content Library saves blocks and pages you use again and again.

How It Works For Your Business

- Create one from the Templates tab with New Template, or use the three-dot menu and Convert to Template on a document.
- Start a new document from a template so you are not building from zero each time.
- Use the Content Library to save reusable blocks and pages, like terms or an about section.
- Templates can be shared. Look for the sharing option to give a template to another account.
- Clone is for a quick one-off copy. A template is for something you will use many times.

Templates and the Content Library – Tips & Guidelines

Tips

- Build your best contract once, then save it.
- Name templates by purpose.
- Save your terms as a reusable block.
- Review templates now and then.

DO

- Name templates clearly
- Save common blocks
- Share what helps
- Update templates when terms change

DON'T

- Clone a master and edit it
- Keep ten near-copies
- Hide a template with a vague name
- Share before checking it

Multiple Recipients and Order

What It Is

One document can have several signers. You assign fields to each person and choose whether they sign one after another or all at once.

How It Works For Your Business

- Add more than one recipient, then assign each field to the right person with the signed-by setting.
- Sequential signing makes people sign in order. The next person gets it only after the one before finishes.
- Simultaneous signing sends it to everyone at the same time.
- The document stays in Waiting for others while any signer has not finished.
- Check that every recipient has an email address and at least one field to complete.

Multiple Recipients and Order – Tips & Guidelines

Tips

- Use sequential when one approval must come first.
- Use simultaneous when order does not matter.
- Give each signer their own fields.
- Watch Waiting for others for slow signers.

DO

- Assign fields per signer
- Pick the order on purpose
- Check every email address
- Track the Waiting tab

DON'T

- Give one person every field
- Pick order by accident
- Add a signer with no fields
- Forget who signs last

Settings, Variables and Automation

What It Is

Settings, variables, and expiry control how documents behave, while workflows and history let you send, track, and follow up. Use them to make signing more automatic.

How It Works For Your Business

- Settings holds sender and CC details, and email templates like Document Received, Document Signed, and Expiry Warning.
- Team Notifications alert you when a document is signed or viewed. You can override the From Name and From Email.
- Insert variables like Created Date, Reference Number, or contact custom fields. Set a redirect page, attach files, and add expiry.
- A workflow can send a template to a contact, and a trigger can start actions when the status changes, like Signed.
- View History shows Sent, Viewed, Edited, and Signed. A completed document has a certificate page, and signed documents can auto-create invoices.

Settings, Variables and Automation – Tips & Guidelines

Tips

- Test email templates with a test contact.
- Use variables so details fill in for you.
- Turn on notifications for signed and viewed.
- Check the History before a follow-up.

DO

- Test every template
- Use variables
- Turn on useful alerts
- Check history first

DON'T

- Use variables without testing
- Forget the expiry setting
- Skip the certificate page
- Rebuild what a workflow can send

Key Terms Glossary

Status tab

A tab that sorts documents by where they stand.

Draft

A saved document that has not been sent yet.

Completed

A document that every required signer has signed.

Element

A building block you drag onto the page.

Split column

Two elements sitting side by side in one row.

Field

A spot where a signer signs, types, dates, or checks.

To Be Signed By

The setting that says which person fills out a field.

Product List

An element that totals your real products for you.

Recipient

A person who is sent the document to sign.

Template

A master version you can reuse for new documents.

Signing order

Whether signers go one after another or all at once.

Certificate

A page on a signed document that records signing details.

Getting Help

Your software changes over time, so a button name or menu spot may look a little different from this guide. If something does not match, check the in-app help for Documents & Contracts, or look for the closest matching option.