



Quick Start Guide

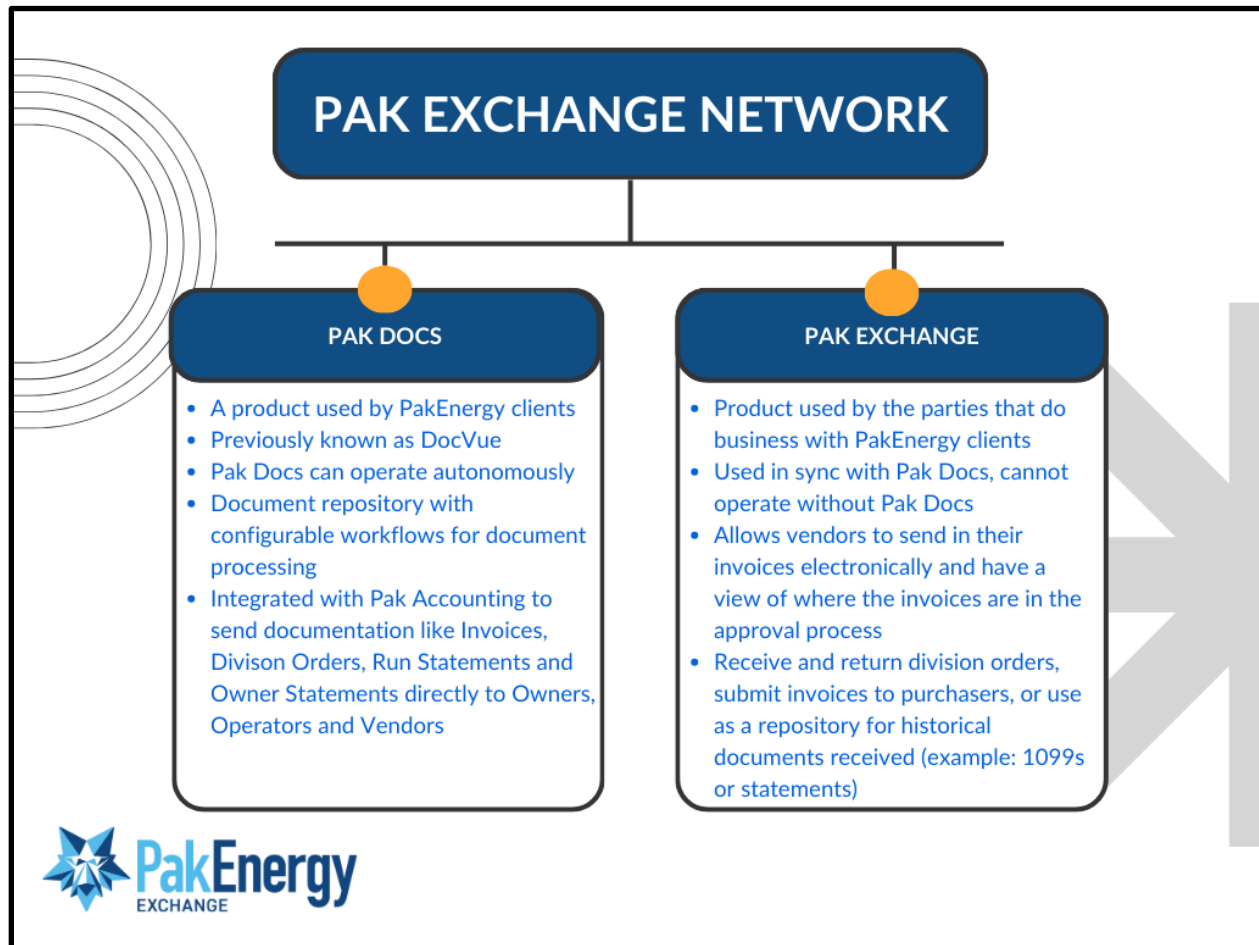
Accepting 1st Invitation

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Overview



PakEnergy Exchange is a platform for exchanging various types of documents digitally through the Internet. It aims to speed up the process of transmitting those typically paper-based documents to ensure you have the most accurate information at your fingertips at all times. You are receiving an invitation because one of your customers has indicated that they do business with you and would like to start exchanging documents digitally with you and your company through the Pak Exchange Network.



Email Invitation Received

If you or your company are not already on the Pak Exchange Network, this training document will walk you through accepting an email invitation. Accepting this connection request will get you or your company ready to share documentation on the Pak Exchange Network.

Your invite will come from pakdocs@email.pakenergy.com. The email will look similar to the one pictured below. It contains a link to set up your account, instructions to help you set it up, an FAQ section, and a link to Help Documentation, if needed, to help you get started.

Hi ABC Drilling Company!

Sarah Stratton with Documentation has invited you to use PakEnergy Exchange to collaborate with them digitally. Use the button below to set up an account and get started transacting today:

[Set Up Account](#)

If you have problems with the above link, copy the following URL into your browser:
<https://uat.docvueexchange.com/register/69ec6446-1d2b-4237-af4e-3ea9b055dd4d>

Need help getting started? Check out our [Help Documentation](#) about getting started

FAQ

What is PakEnergy Exchange?
PakEnergy Exchange is a platform for exchanging various types of documents digitally through the Internet. It aims to speed up the process of transmitting those typically paper based documents to ensure you have the most accurate information at your finger tips at all times

Why am I receiving this invitation?
The reason you are receiving this invitation is because Documentation has indicated that they do business with you, and would like to start exchanging documents digitally with you and your company

How should I proceed?
Signing up is a simple, straight forward process comprised of a couple of steps:

1. Click the *Set Up Account* button above
2. Enter some basic information about your company such as your name, address, etc.
3. Enter some information about your initial Admin user - don't worry you can have more than one or change it later
4. Accept the invitation from Documentation
5. Sit back and relax knowing that you can now securely transmit documents!

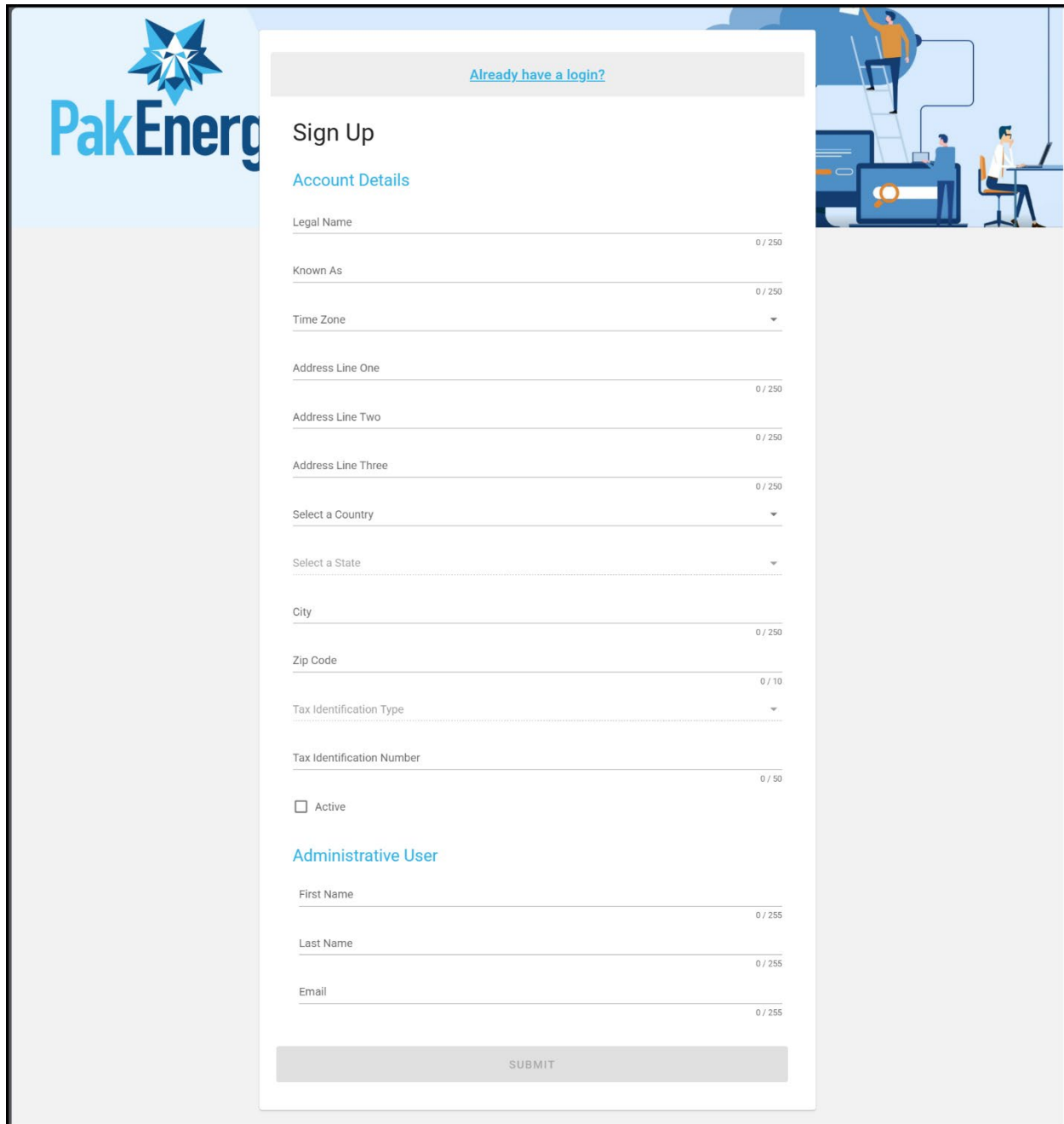
I'm having problems signing up, how can I get assistance?
Check out our comprehensive [Help Documentation](#) to answer all of your questions or concerns about signing up with PakEnergy Exchange

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500 Chestnut Street, Suite 500, Arlington, Texas 75602

You have been sent this email because Documentation has indicated they do business with you. If this is not the case, please contact Documentation to have this corrected.

Account Creation

After clicking the Set Up account button from the email, you will be redirected to the Pak Exchange Network registration page. **NOTE:** It is essential to use the specific Set Up Account link, or the URL included in the email received. Failure to use this link could result in a failed connection. Let's discuss the registration page. Fields in **red** are required.



The screenshot shows the PakEnergy Sign Up page. The page has a light blue header with the PakEnergy logo on the left and an illustration of people working on a computer on the right. The main content area is a white form with a light blue border. At the top of the form, there is a link "Already have a login?". Below this is the "Sign Up" heading, followed by the "Account Details" section. The form fields for "Account Details" are: Legal Name (0 / 250), Known As (0 / 250), Time Zone (dropdown), Address Line One (0 / 250), Address Line Two (0 / 250), Address Line Three (0 / 250), Select a Country (dropdown), Select a State (dropdown), City (0 / 250), Zip Code (0 / 10), Tax Identification Type (dropdown), Tax Identification Number (0 / 50), and an "Active" checkbox. Below these is the "Administrative User" section with fields for First Name (0 / 255), Last Name (0 / 255), and Email (0 / 255). At the bottom of the form is a "SUBMIT" button.

[Already have a login?](#)

Sign Up

Account Details

Legal Name 0 / 250

Known As 0 / 250

Time Zone ▼

Address Line One 0 / 250

Address Line Two 0 / 250

Address Line Three 0 / 250

Select a Country ▼

Select a State ▼

City 0 / 250

Zip Code 0 / 10

Tax Identification Type ▼

Tax Identification Number 0 / 50

☐ Active

Administrative User


First Name 0 / 255

Last Name 0 / 255

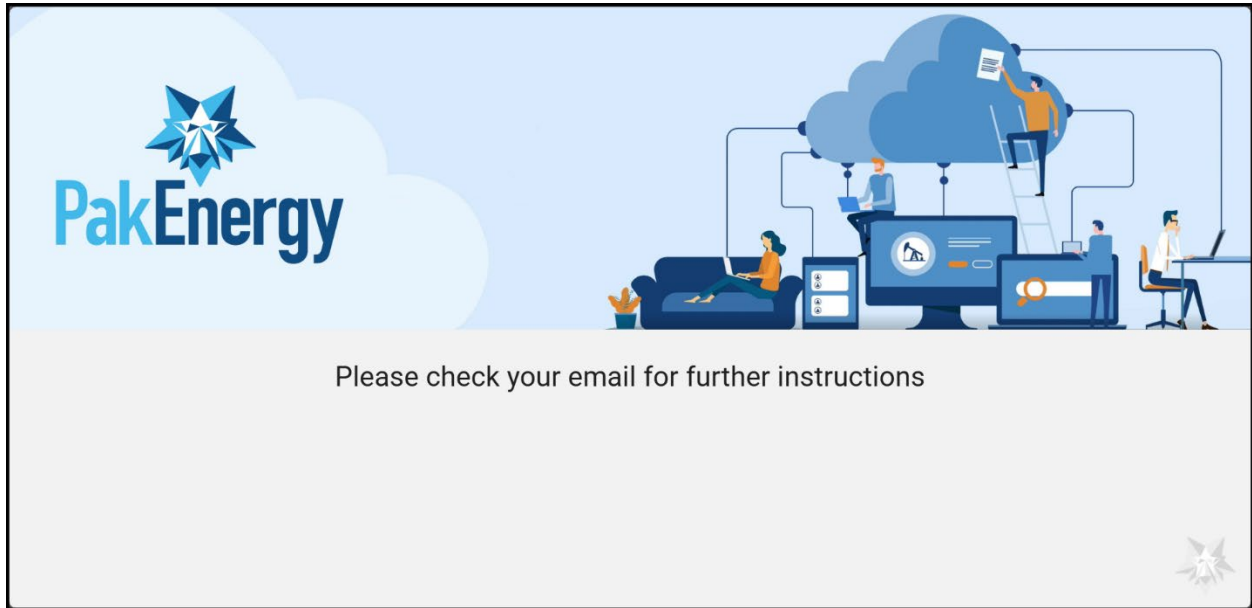
Email 0 / 255

SUBMIT

Account Details	
Legal Name	<p>Please ensure that this field is the Legal Name as it relates to the IRS-issued Tax Identification Number (TIN).</p> <ul style="list-style-type: none"> For a business: the Legal Name will be the Legal Business Name associated with the Employer Identification Number (EIN) assigned by the IRS on Form SS-4. As an Individual, the Legal Name will be the full name of the person associated with the Social Security Number (SSN) assigned by the IRS on your personal Social Security Card. <p>This step is important because the Legal Name and Tax ID are just a couple of factors Pak Exchange uses to differentiate between connections. Please ensure this information is correct (as recorded with the IRS) and consistent with what is provided to the inviting connection.</p>
Known As	If your company or you, as an individual, go by a different name than what is associated with your EIN or SSN, you can list it in this section. This field is not required.
Time Zone	Using the drop-down arrow, please select the time zone that you or your company operates in.
Address Line One	The first line of your personal or company's mailing address.
Address Line Two	The second line of your personal or company's mailing address. If a second line is not required in your mailing address, this field can be omitted.
Address Line Three	The third line of your personal or company's mailing address. If a third line is not required in your mailing address, this field can be omitted.
Select a Country	Using the drop-down arrow, please select the Country in which you or your company does business. This will be the same Country as your mailing address.
Select a State	Using the drop-down arrow, please select the State in which you or your company does business. This will be the same State as your mailing address.
City	Please enter the City in which you or your company does business. This will be the same City as your mailing address.

Zip Code	Please enter the Zip Code in which you or your company does business. This will be the same Zip Code as your mailing address.
Tax Identification Type	Using the drop-down menu, please select the option for the TIN, EIN, or SSN that you will be entering for this account creation.
Tax Identification Number	Use this field to enter the 9-digit number of the TIN, EIN, or SSN.
 Active Checkbox	Please ignore this checkbox.
Administrative User	
First Name	Please enter the first name of the Administrative User for your company. If you are joining the Pak Exchange Network as an individual, you will enter your first name.
Last Name	Please enter the last name of the Administrative User for your company. If you are joining the Pak Exchange Network as an individual, you will enter your last name.
Email	Please enter the email address of the administrative user for your company. If you are joining the Pak Exchange Network as an individual, you will enter your email address. NOTE: The email address that is entered at the time of signup can be different from the one used when the invitation email was sent. The email address that is used at the time of signup is going to be the username from now on.

After all required fields have been entered, the Submit button will turn blue and become clickable. Click the Submit button, and you will receive a screen like the one below.



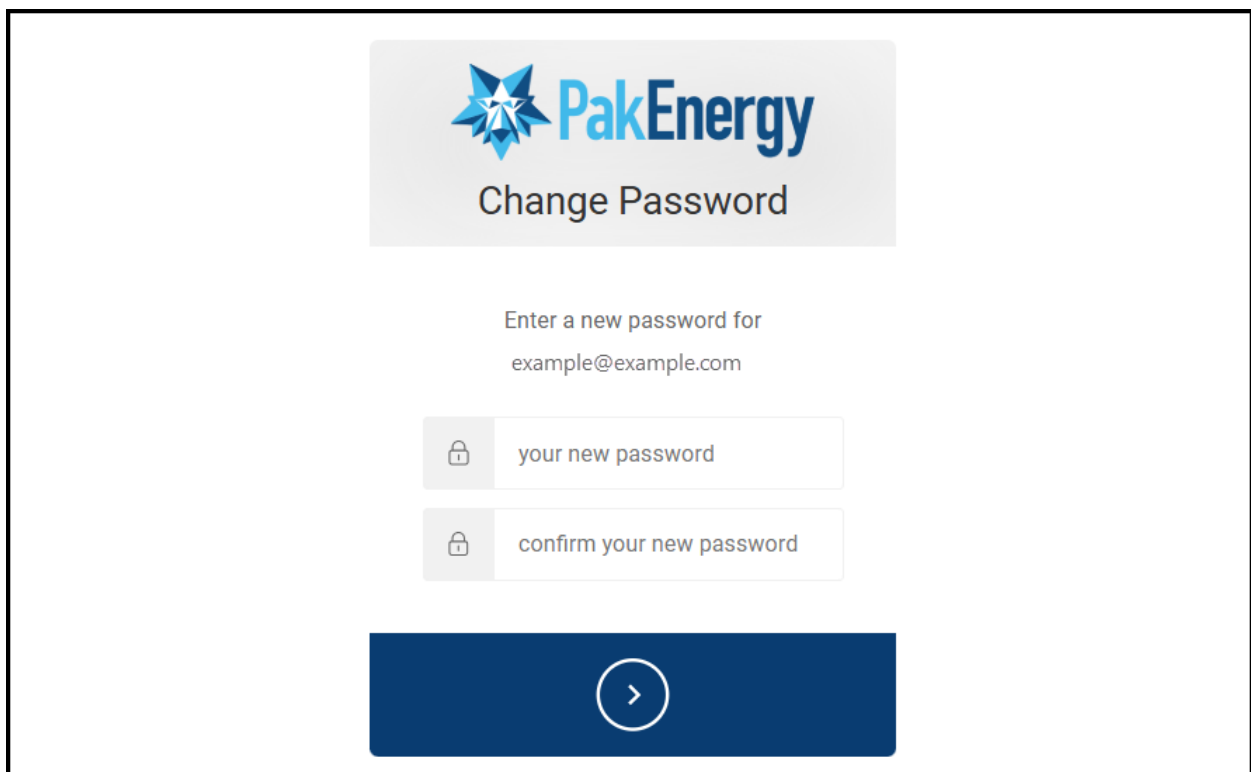
At this time, you should have received another email from PakEnergy—specifically, from notifications@email.pakenergy.com—titled “Welcome to Pak Energy.” Please click on the blue link to set up your password for the Pak Exchange Network—the screen you will be directed to will look like the one below.



Password Requirements

When choosing a password for the Pak Exchange Network, you will need to fulfill the following requirements:

1. At least 8 characters in length
2. Must contain 3 out of the 4 following types of characters:
 - a. Lower case letters (a-z)
 - b. Upper case letters (A-Z)
 - c. Numbers (0-9)
 - d. Special characters (!@#\$%^&*)



The image shows a 'Change Password' form for PakEnergy. At the top is the PakEnergy logo, which consists of a blue star-like icon and the text 'PakEnergy'. Below the logo is the title 'Change Password'. The form prompts the user to 'Enter a new password for' followed by the email address 'example@example.com'. There are two password input fields, each with a lock icon on the left. The first field is labeled 'your new password' and the second is labeled 'confirm your new password'. At the bottom of the form is a large blue button with a white right-pointing arrow inside a circle.

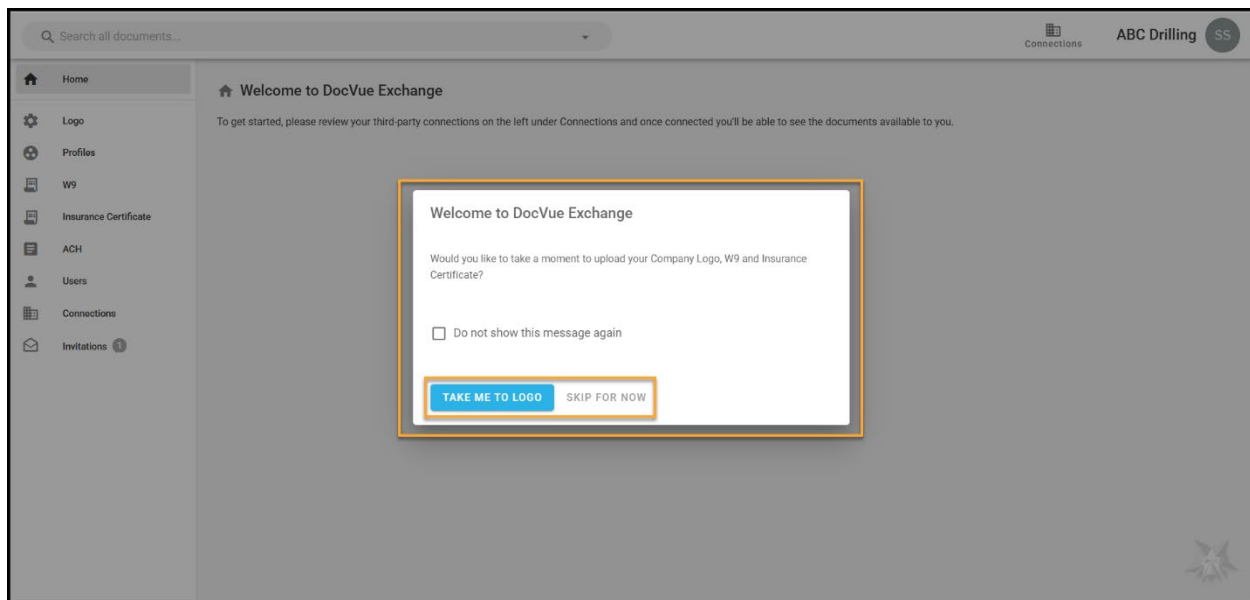
Once you have met the password requirements and re-entered your password for verification purposes, please click on the white arrow in the navy blue box at the bottom of the screen.

The screenshot shows a password verification interface. A dark grey tooltip with an orange border is positioned above two password input fields. The tooltip contains the following text: "At least 8 characters in length", "Contain at least 3 of the following 4 types of characters:", "Lower case letters (a-z)", "Upper case letters (A-Z)", "Numbers (i.e. 0-9)", and "Special characters (e.g. !@#\$%^&*)". The first input field has a lock icon and six dots. The second input field also has a lock icon and eight dots. Below the input fields is a large navy blue button with a white right-pointing arrow inside a circle. The entire interface is enclosed in a black rectangular frame.

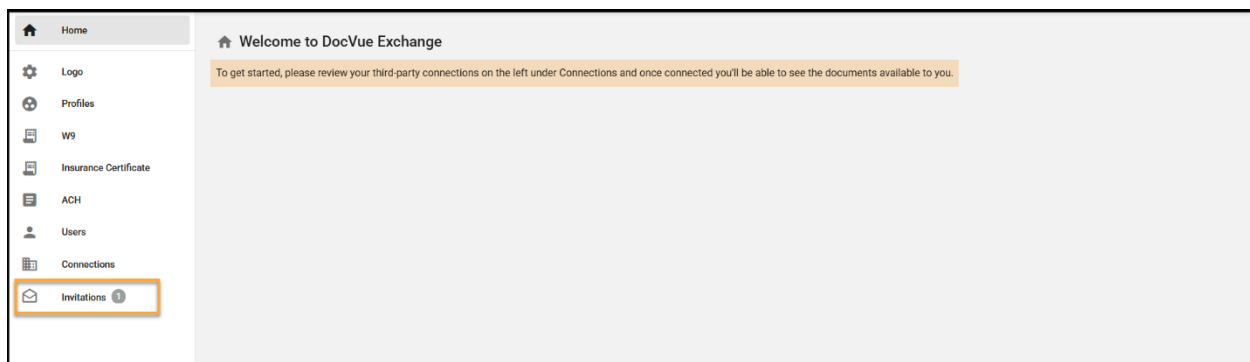
This action will take you to the login screen for Pak Exchange. At this time, it is recommended that you favorite or bookmark Pak Exchange for faster and easier access in the future. The Pak Exchange URL is <https://docvueexchange.com>.

Accepting First Connection Request

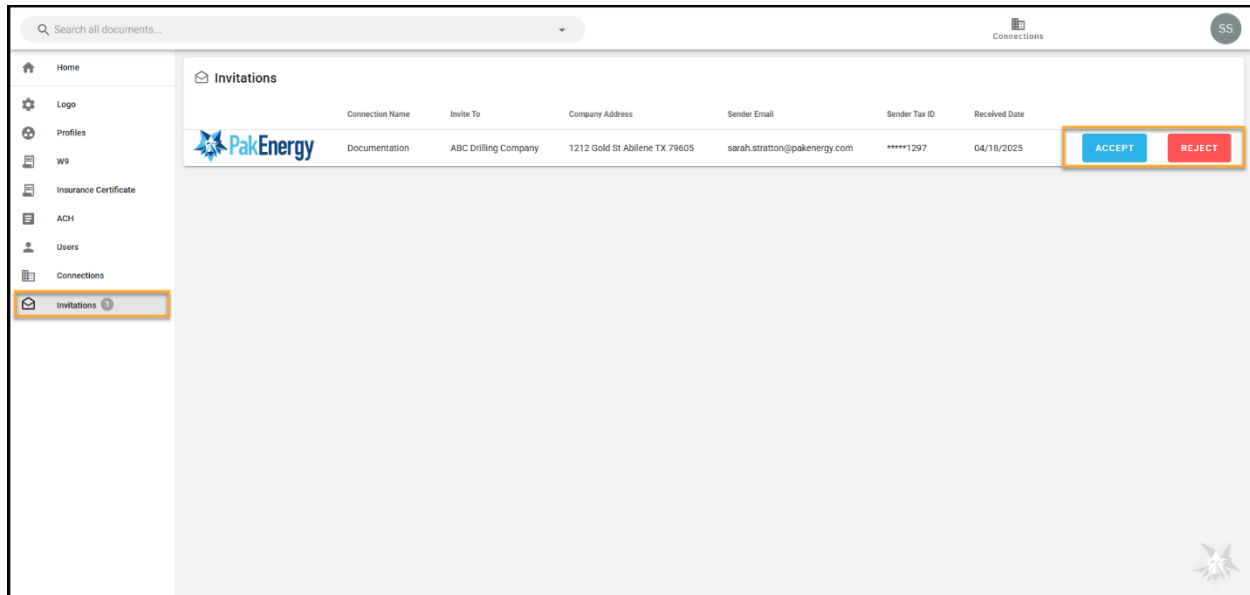
Once you have logged in with the email address used at the time of account creation and your recently created password, you will be greeted with your home dashboard and a pop-up box that states, “Welcome to DocVue Exchange.” If preferred, at this time, the User can click on the button Take Me There to add their company logo and to upload their first documents, like a W9 and an insurance certificate. To continue setting up Pak Exchange, we are going to select Skip for Now. For more information on how to add your company logo, please view our Quick Reference Guide: [How to Add a Company Logo](#).



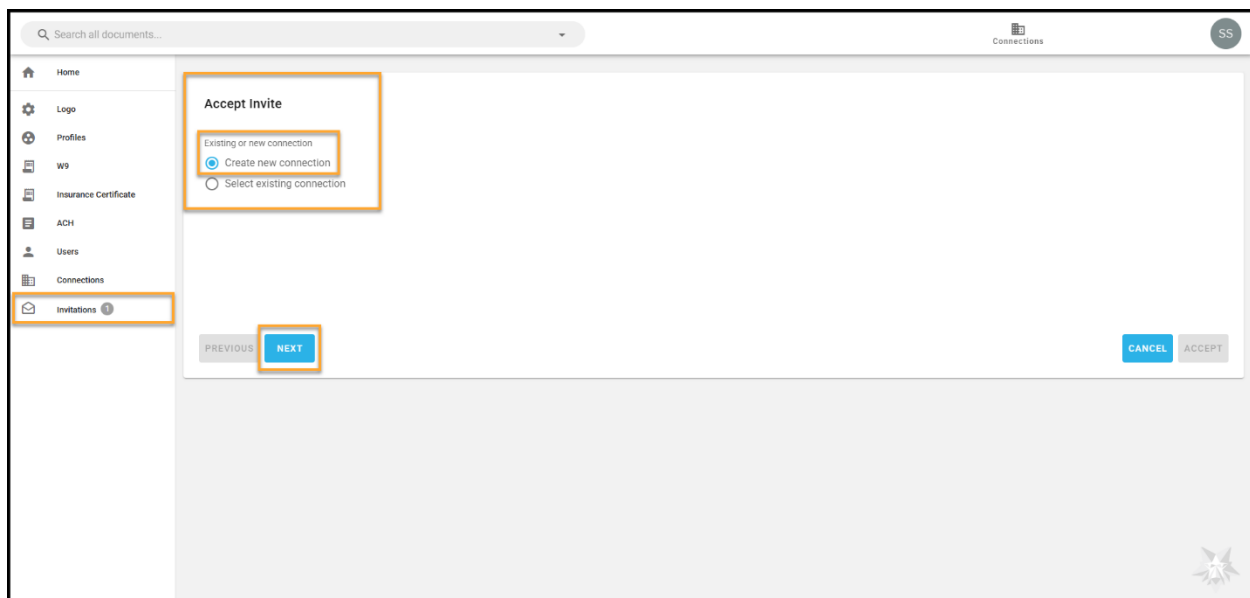
With the Skip for Now button selected, we will navigate to the Invitations tab on the bottom left-hand side of our home dashboard.



Once clicked, you will have the option to Accept or Reject the invitation. However, please note that rejecting an invitation from anyone wishing to connect with you means that you will not be able to submit or receive any documentation from that requesting connection.

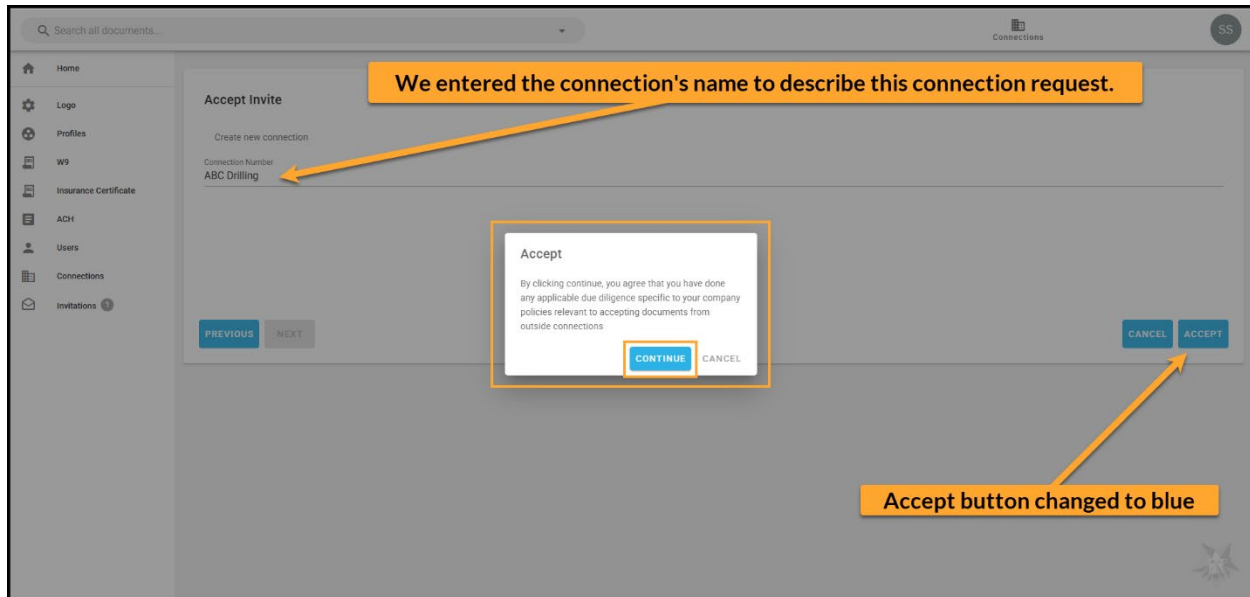


We will continue assuming that you want to accept the connection request. Clicking Accept will bring up a different screen that provides the option to Create a new connection or Select existing connection. For first time setup, you will not have any other connections to connect to. If you have questions about the Select existing connection option, please get in touch with our Customer Success Team. To continue, you will hit the Next button in blue.



The Create new connection option allows you to enter a name or number to identify the connection. If your company doesn't have a specific naming convention, you can also enter a description of the connection or use the connection's name as is.

Once the name of the connection has been entered, you will notice that the Accept button on the right-hand side of the screen has changed from gray to blue. This means that all information required for this connection has been entered, and you are ready to continue.



Click Accept, and a pop-up box will appear confirming that you have entered all information correctly and have done any applicable due diligence specific to your company policies relevant to accepting documents from outside connections. If true, please click on the Continue button in blue to complete the connection. Once completed, you will be directed back to the Invitations screen, and a blue message will appear at the top of your screen letting you know that you have been successfully connected.

