

# MassMailer Walkthroughs

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# Walkthrough Scenarios

## Data collection in volume

- Zoom Jet Packs is required to collect insurance details from their lessees on an annual basis.
- A standard form is used to notify lessees and request data.
- The form is tagged to include prepopulated data and fields for collecting data.
- The form must be signed by the lessee. The act of signing also submits the user-provided data.
- A template can be used, so the same tagged form can be reused multiple times.
  - This allows a test run, followed by a full production run. CSV files for each are included in the samples.
- During the notification and collection process, transactions can be tracked, showing who has submitted their forms, and which forms are still outstanding.
- Data collected is processed in Excel, making it ready for upload to a business application and preparing it for analysis.

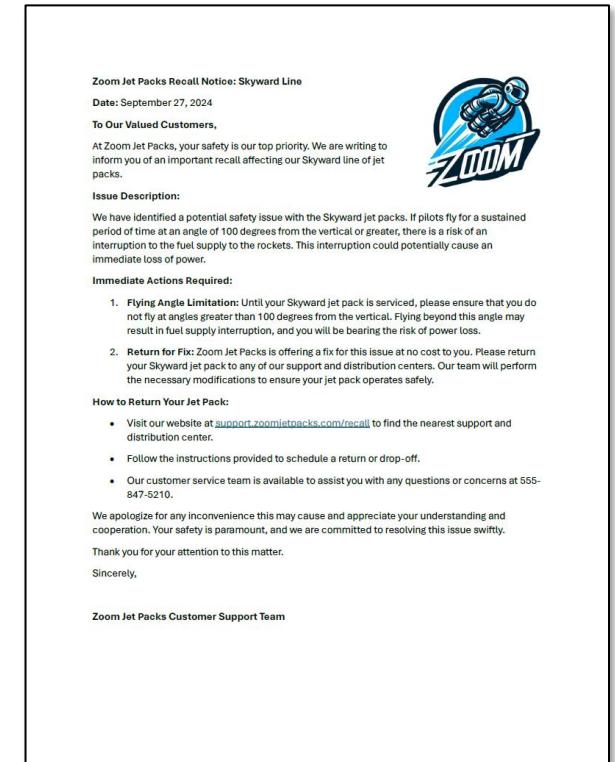
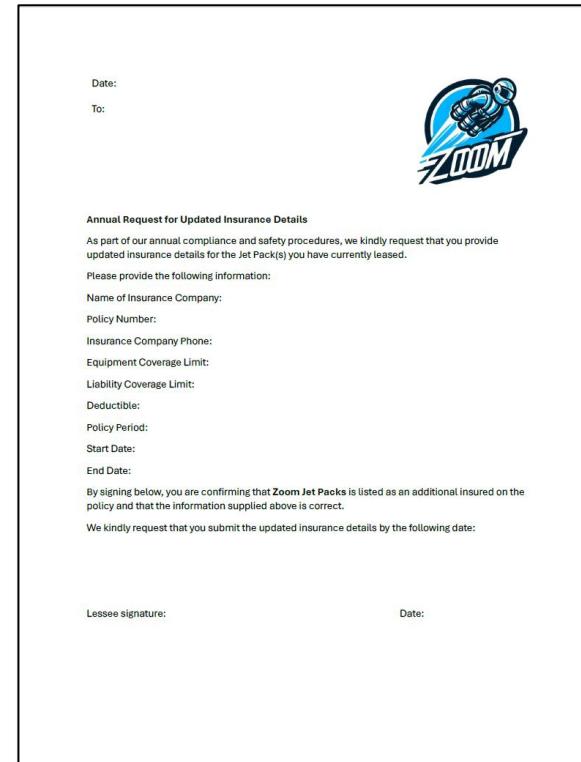
## Document distribution and tracking of acknowledgements

- Zoom Jet Packs must send a recall notice to certain customers, and track acknowledgements.
- A recall notice document is included in the sample files, along with a corresponding CSV file for distribution list.
- The document is be uploaded to SIGNiX, tagged for requesting acknowledgement, and then sent to the distribution list.
- Acknowledgements can be tracked.

# Sample Files on GitHub

- Repository:
  - <https://github.com/kmsignix/zoom-massmailer>

**SIGNIX**  
SIGNIX digital signature platform has MassMailer feature for distributing documents and forms and collecting data and signatures



# Walkthrough – Data Collection

SIGNIX

webtest.signix.biz/ui/uxr3/documentDashboard/index.jsp?s=signix&c=mydox&u=%21%21Demo%21%21KMatthews6490&w=SDD&nosso=true

Logout

# SIGNIX

MyDox Client - Workgroup SDD

Dashboard | Transactions | Templates | Mass Mailer | ENotary Profile

Create New Transaction

### Transactions by Status

Today

Status	Count
All Transaction	1
Complete	0
In Process	0
Expired	0
Suspended	0
Cancelled	0

### Recently Updated Transactions

Name	Status	Last Modified
Annual_Ins_Req_1_Max_Fun	Complete	17 hours ago
Document Set: Matthews - 26 Sep 2024	Complete	18 hours ago

### Recently Completed Transactions

Name	Last Modified	Action
Annual_Ins_Req_1_Max_Fun	17 hours ago	<button>Download All Document(s)</button>
Document Set: Matthews - 26 Sep 2024	18 hours ago	<button>Download All Document(s)</button>

### Recently Updated Templates

Name	Last Modified
Zoom Annual Insurance Update	58 minutes ago
try mm test template 1	Sep 20 2024 04:39 PM
MM test template 1	Sep 20 2024 04:38 PM
Sig 2281 SDD Template 2	Sep 17 2024 12:22 PM
Sig 2281 SDD Template 1	Sep 17 2024 12:10 PM

SIGNiX

webtest.signix.biz/ui/uxr3/documentDashboard/index.jsp?view=MassMailer&s=signix&c=mydox&u=%21%21Demo%21%21KMatthews6490&w=SDD&nosso=true

Logout

# SIGNiX

MyDox Client - Workgroup SDD

Dashboard | Transactions | Templates | Mass Mailer | ENotary Profile

Show 10 entries

Last Updated Mailing Name Status

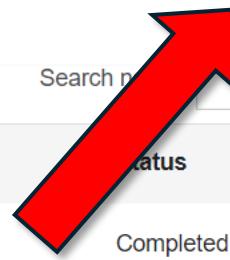
Last Updated	Mailing Name	Status
18 hours ago	Zoom Annual Insurance Update - Test 1	Completed

Create New Transaction

Search name

Showing 1 to 1 of 1 entries

Previous 1 Next



SIGNiX

webtest.signix.biz/ui/uxr3/wizard/index.jsp

Save Save As Home

Order

Add New Signer CC List Address

Move Down Move Up

Next

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TERMS OF SERVICE VS12 - PRIVACY POLICY

## Mass Mailer

This feature allows you to send a document or multiple documents for review and signature to any number of recipients using a single template. All you'll need is a .CSV file formatted per SIGNiX requirements, linked [here](#).

A single placeholder signer will be added to your transaction and you'll be prompted to upload the .CSV file. Then, add a document (or documents) to the transaction on the Documents tab and finally add at least one signature or Agree/Acknowledge task to each document on the Signatures tab.

When you're ready, go to the Send tab and hit the Send All button. At any point, you can return to the Signers tab to see the list of recipients.

Cancel Start



SIGNiX

webtest.signix.biz/uxr3/wizard/index.jsp

Save Save As Home

Order

Add New Signer CC List Address

Move Down Move Up

Next

Upload Recipient List

Upload a .CSV file, formatted to SIGNiX requirements, and click OK.

Choose File No file chosen

OK



This screenshot shows a web-based document signing application interface. A modal dialog box is open in the center, titled 'Upload Recipient List'. It contains instructions to upload a .CSV file and a 'Choose File' button with the message 'No file chosen'. A prominent red arrow points from the bottom left towards the 'Choose File' button. In the top right corner of the modal, there is an 'OK' button. The background of the application shows a sidebar with tabs like 'Order', 'Add New Signer', 'CC List', and 'Address', along with buttons for 'Move Down', 'Move Up', and 'Next'. The top navigation bar includes links for 'Save', 'Save As', and 'Home', along with standard browser controls like back, forward, and search.

SIGNiX

webtest.signix.biz/ui/uxr3/wizard/index.jsp

# SIGNiX

Order

Add New Signer CC List Address

## Upload Recipient List

Upload a .CSV file, formatted to SIGNiX requirements, and click OK.

Choose File No file chosen

Open

Karl - ProNvest, Inc > Documents > MyDoX > Sandbox > Zoom Jet Packs >

Search Zoom Jet Packs

OK

Next

Organize New folder

Name	Status	Date modified	Type
Annual-Insurance-Request-test1-2024	✓	9/27/2024 9:48 AM	Microsoft Excel Comma Separated Value
Zoom Jet Packs Recall Notice 2024-09-20	✓	9/20/2024 4:57 PM	Adobe Acrobat Document
Zoom Jet Packs Recall Notice 2024-09-20	✓	9/20/2024 4:57 PM	Microsoft Word Document
Annual-Recall-Notice-test1-2024	✓	9/20/2024 4:41 PM	Microsoft Excel Comma Separated Value
Annual-Insurance-Request-2024	✓	9/20/2024 10:10 AM	Microsoft Excel Comma Separated Value
Zoom-Annual-Insurance-Update-Form 2024-09-19	✓	9/19/2024 9:41 AM	Adobe Acrobat Document
Zoom-Annual-Insurance-Update-Form 2024-09-19	✓	9/19/2024 9:41 AM	Microsoft Word Document

File name: Annual-Insurance-Request-test1-2024

All Files

Open Cancel

Move Down Move Up

TERMS OF SERVICE V512 - PRIVACY POLICY

A red arrow points to the 'Annual-Insurance-Request-test1-2024' file in the file selection dialog.

SIGNiX

Order

Add New Signer CC List Address

Upload Recipient List

Upload a .CSV file, formatted to SIGNiX requirements, and click OK.

Choose File Annual-Insurance-Request-test1-2024.csv

OK

Move Down Move Up Next

Save Save As Home

SIGNiX

webtest.signix.biz/ui/uxr3/wizard/index.jsp

# SIGNiX

Signers Documents Signatures Send Status

MassMailer - 2024-09-27 - !!Demo!!KMatthews6490 1 Mass Mailer Recipients

Transaction Name	First Name	Last Name	Email	Authentication
Annual_Ins_Req_1_Max_Fun	Max	Fun	signixkarl@gmail.com	SelectOneClick

Your CSV file has extra fields that must be placed as text fields on the document(s): lesseeAddr2, coverageEquipt, endDate, lesseeAddr1, insurerName, policyPeriod, provideByDate, coverageLiability, insurerPhone, deductible, lesseeName, policyNum, dateSent, startDate

Replace CSV Download CSV

Next



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SIGNiX

webtest.signix.biz/ui/uxr3/wizard/index.jsp

Signers Documents Signatures Send Status

Upload Documents Click the button or drag and drop files from your computer here

Order Document Name

Please add a document

Move Down Move Up

> Signer Attachmen

Previous Next



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TERMS OF SERVICE NS12 - PRIVACY POLICY

SIGNiX

webtest.signix.biz/ui/uxr3/wizard/index.jsp

Signers Documents Signatures Send Status

Upload Documents Click the button or drag and drop files from your computer here

Order Document Name

Please add a document

Open

Karl - ProNvest, Inc > Karl - ProNvest, Inc > Documents > MyDoX > Sandbox > Zoom Jet Packs

Move Down Move Up

Organize New folder

Zoom Jet Packs Recall Notice 2024-09-20

Zoom-Annual-Insurance-Update-Form 2024-09-19

Zoom Safety Advisory

Zoom Safety Advisory - Signed

Zoom Safety Advisory Untagged

Zoom Jet Pack Lease - Signed

Zoom Lease Agreement (1) Untagged

File name: Zoom-Annual-Insurance-Update-Form 2024-09-19

Type: Adobe Acrobat Document

Move Down Move Up

Next

TERMS OF SERVICE WS12 - PRIVACY POLICY

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A red arrow points to the "Zoom-Annual-Insurance-Update-Form 2024-09-19" file in the file list.

SIGNiX

webtest.signix.biz/ui/uxr3/wizard/index.jsp

Signers Documents Signatures Send Status

Upload Documents Click the button or drag and drop files from your computer here

Order	Document Name	
1	Zoom-Annual-Insurance-Update-Form 2024-09-19	

Showing 1 to 1 of 1 entries

Move Down Move Up

> Signer Attachments

Previous Next



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SIGNIX

webtest.signix.biz/uxr3/wizard/index.jsp

Save As 4 K

# SIGNIX

Signers Documents Signatures Send Status

documents Zoom-Annual-Insurance-Update-Form 2024-09-19 Signers Placeholder1 Document Fields

Signature Initial Text Checkbox Type Text Read Ack/Agree

**Signature** JH T ✓ Ab A Read

**Initial**

**Text**

**Checkbox**

**Type Text**

**Read**

**Ack/Agree**

Date: To:



**Annual Request for Updated Insurance Details**

As part of our annual compliance and safety procedures, we kindly request that you provide updated insurance details for the Jet Pack(s) you have currently leased.

Please provide the following information:

Name of Insurance Company:

Policy Number: + Zoom -

SIGNiX

webtest.signix.biz/ui/uxr3/wizard/index.jsp

Save As 4 K ...

# SIGNiX

Signers Documents Signatures Send Status

documents Zoom-Annual-Insurance-Update-Form 2024-09-19 Signers Placeholder1 Document Fields

Signature Initial Text Checkbox Type Text Read Ack/Agree

End Date:  
By signing below, you are confirming that **Zoom Jet Packs** is listed as an additional insured on the policy and that the information supplied above is correct.  
We kindly request that you submit the updated insurance details by the following date:

Lessee signature: Placeholder1 Date: MM/dd/yyyy

+

Zoom

SIGNiX

webtest.signix.biz/uxr3/wizard/index.jsp

Signers Documents Signatures Send Status

Signature Placeholder1 Document Fields

Initial

T Text

dateSent

To:

ZOOM

Annual Request for Updated Insurance Details

As part of our annual compliance and safety procedures, we kindly request that you provide updated insurance details for the Jet Pack(s) you have currently leased.

Please provide the following information:

Name of Insurance Company:

Policy Number:

+ Zoom -

Save Save As Home

Signature Placeholder1 Document Fields

Date: dateSent

To:

ZOOM

Annual Request for Updated Insurance Details

As part of our annual compliance and safety procedures, we kindly request that you provide updated insurance details for the Jet Pack(s) you have currently leased.

Please provide the following information:

Name of Insurance Company:

Policy Number:

+ Zoom -

Save Save As Home

SIGNiX

webtest.signix.biz/uxr3/wizard/index.jsp

Save As 4 K

# SIGNiX

Signers Documents Signatures Send Status

documents Zoom-Annual-Insurance-Update-Form 2024-09-19 Signers Placeholder1 Document Fields

Signature Initial Text Checkbox Type Text Read Ack/Agree

Date: dateSent To: lesseeName lesseeAddr1 lesseeAddr2



**Annual Request for Updated Insurance Details**

As part of our annual compliance and safety procedures, we kindly request that you provide updated insurance details for the Jet Pack(s) you have currently leased.

Please provide the following information:

Name of Insurance Company:

Policy Number: + Zoom -

SIGNiX

webtest.signix.biz/ui/uxr3/wizard/index.jsp

Save Save As Home

Signers Documents Signatures Send Status

Placeholder1

Signature Initial Text Checkbox Type Text Read Ack/Agree

Document Fields

Please provide the following information:

Name of Insurance Company:	insurerName
Policy Number:	policyNum
Insurance Company Phone:	insurerPhone
Equipment Coverage Limit:	coverageEquipt
Liability Coverage Limit:	coverageLiability
Deductible:	deductible
Policy Period:	policyPeriod
Start Date:	startDate
End Date:	endDate

By signing below, you are confirming that **Zoom Jet Packs** is listed as an additional insured on the policy and that the information supplied above is correct.

We kindly request that you submit the updated insurance details by the following date:

provideByDate

SIGNiX

webtest.signix.biz/ui/uxr3/wizard/index.jsp

?

Save

Save As

Home

# SIGNiX

Signers Documents Signatures Send Status

Demonstration Mode?  
 Yes  No

Email Message

Your documents are available online for viewing and signing.

Reminders/Expiration Schedule  
Drag the slider to choose when documents expire and reminders are sent to all signers. You can choose to send no reminders.

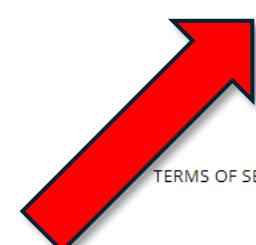
The documents will expire after 10 day(s), and signer(s) will receive reminders on day(s) 3 and 7

I do not want to send reminders to signer(s)

Clicking Send All will start the MassMailer process and send notifications to the 1 recipients shown on the Signers tab. Be sure to double check all of your information prior to starting the MassMailer.

Previous

Send All



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SIGNIX

webtest.signix.biz/uxr3/wizard/index.jsp

Demonstration Mode?  
● Yes ○ No

Email Message  
Your documents are available online.

Reminders/Expiration Schedule  
Drag the slider to choose when documents expire.

I do not want to send reminders

Clicking Send All will start the MassMailer process and send notifications to the 1 recipients shown on the Signers tab. Be sure to double check all of your information prior to starting the MassMailer.

Previous

Save

Save As

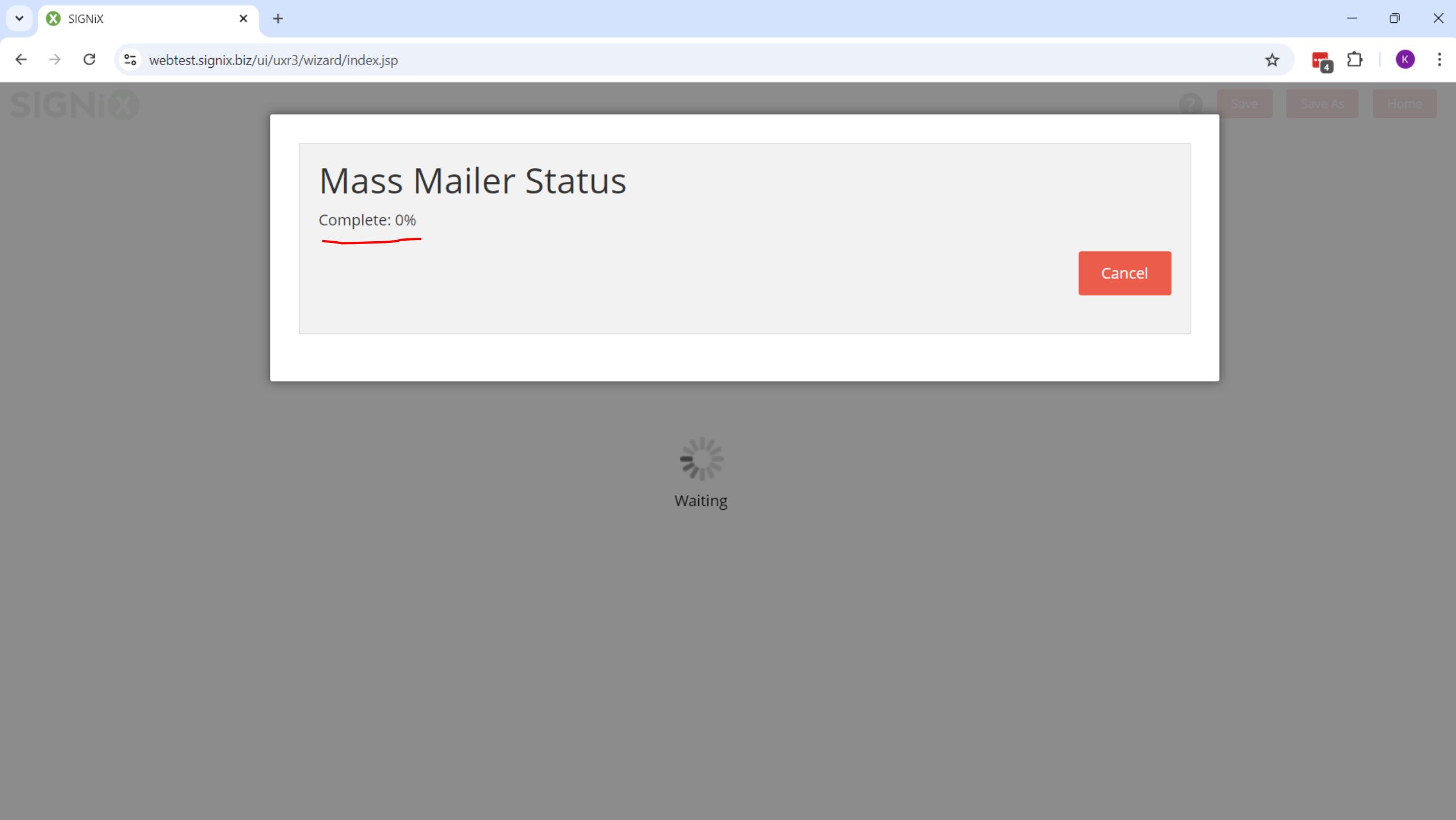
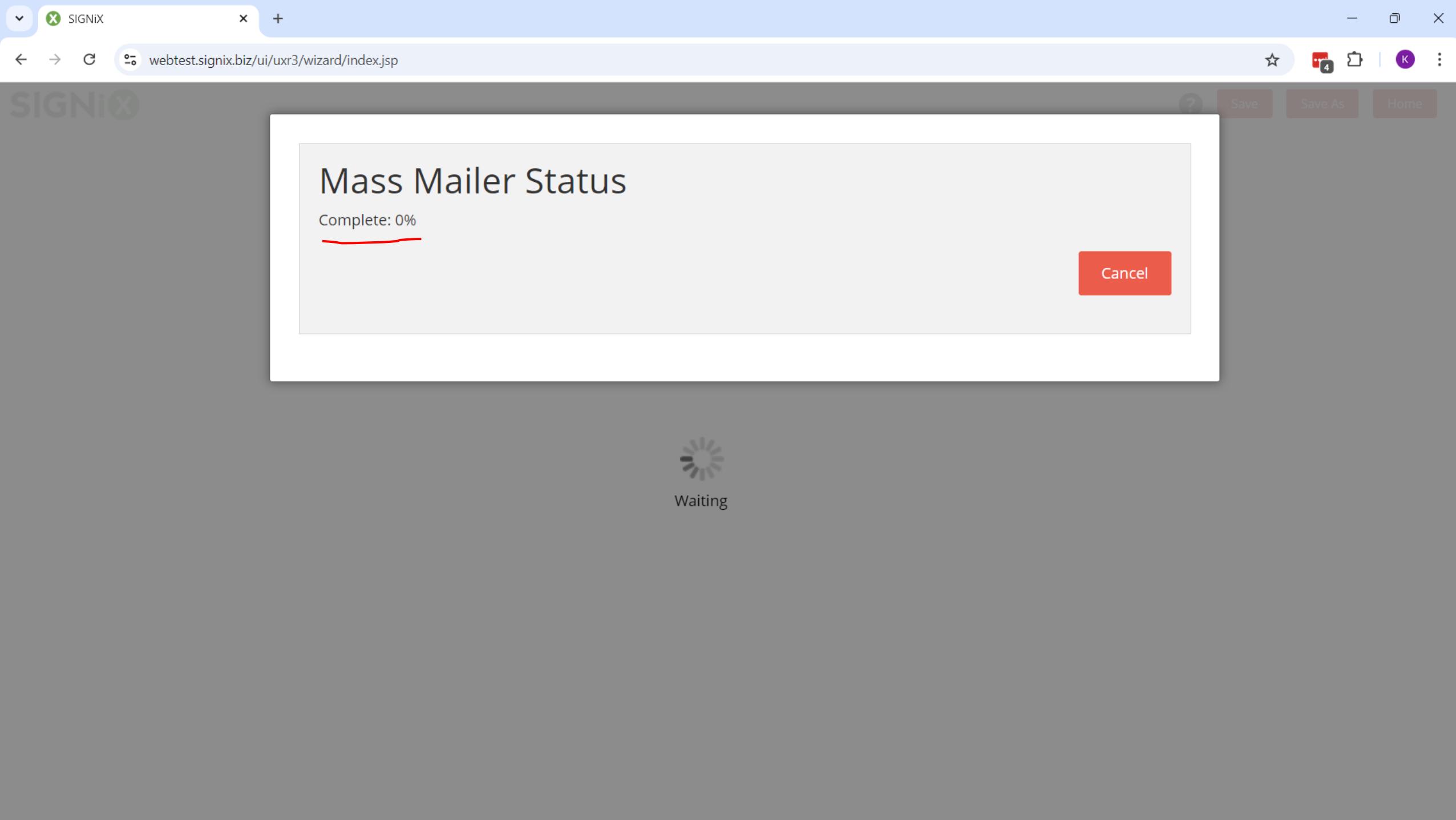
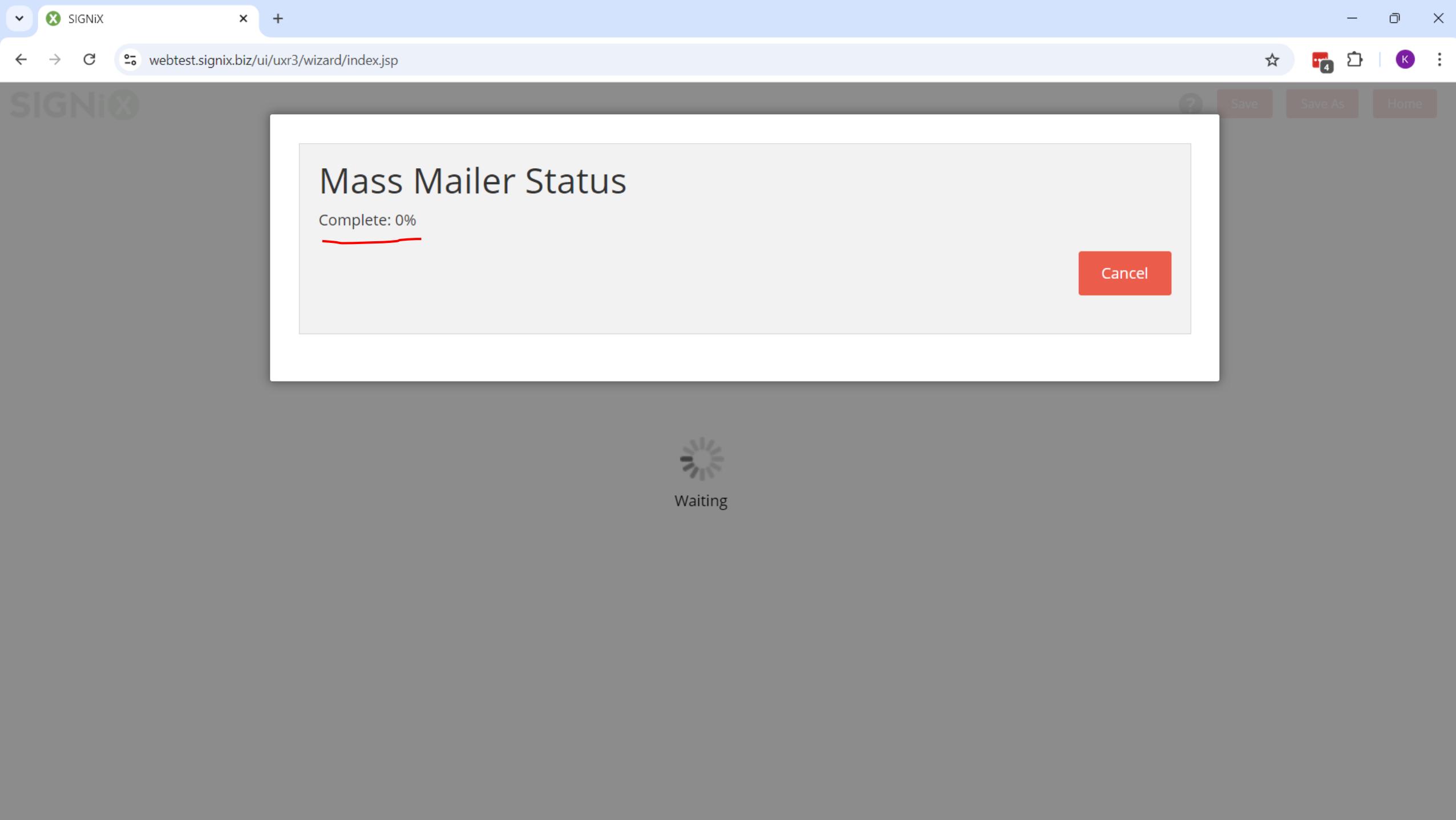
Home

Start MassMailer

New MassMailer Name  
Annual Insurance Request Test Run

OK

A large red arrow points from the bottom right towards the "OK" button in the dialog box.



SIGNiX

webtest.signix.biz/ui/usr3/wizard/index.jsp

Save Save As Home

Completed

Mass Mailer completed successfully: 1 of 1 transactions were generated and delivered to signers.

1 of 1

OK

Waiting



SIGNIX

webtest.signix.biz/ui/uxr3/documentDashboard/index.jsp?s=signix&c=mydox&u=%21%21Demo%21%21KMatthews6490&w=SDD&nosso=true

Logout

# SIGNIX

MyDox Client - Workgroup SDD

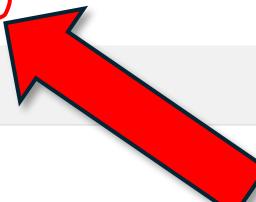
Dashboard | Transactions | Templates | Mass Mailer | ENotary Profile

Create New Transaction

Show 10 entries Search name:

Last Updated	Mailing Name	Status
moments ago	Annual Insurance Request Test Run 2	0 of 1 complete
18 hours ago	Zoom Annual Insurance Update - Test 1	Completed

Showing 1 to 2 of 2 entries Previous 1 Next



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TERMS OF SERVICE VS12 - PRIVACY POLICY

SIGNIX

MyDox Client - Workgroup SDD

Show 10 entries

Last Updated

moments ago

18 hours ago

Showing 1 to 2 of 2 entries

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webtest.signix.biz/ui/uxr3/documentDashboard/index.jsp?s=signix&c=mydox&u=%21%21Demo%21%21KMatthews6490&w=SDD&nosso=true

Logout

## Mass Mailer Summary

Name : Annual Insurance Request Test Run 2

Status : 0 of 1 complete

Submitter : !!Demo!!KMatthews6490

CSV : Annual-Insurance-Request-test1-2024.csv [Download](#)

### Individual Transactions

Transaction Name	Date Created	Status
Annual_Ins_Req_1_Max_Fun	2024-09-27 10:20:57.0	0 of 1

Search:

Previous 1 Next

[Close](#) [Report](#)

Inbox (1) - signixkarl@gmail.com +

mail.google.com/mail/u/0/?tab=rm&ogbl#inbox

Gmail Search mail

Compose

Inbox 1

Starred

Snoozed

Sent

Drafts

More

Labels +

MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_1\_Max\_Fun - Your Documents Are Ready! Dear Max Fun, Hello Your ... 10:21AM

1-1 of 1 < >

Red arrow pointing upwards from the bottom of the inbox list towards the top of the screen.

0 GB of 15 GB used

Terms · Privacy · Program Policies

Last account activity: 17 hours ago

Details

You Have Documents Ready to 

mail.google.com/mail/u/0/?tab=rm&ogbl#inbox/

Gmail Search mail 

Compose

Inbox Starred Snoozed Sent Drafts More

Labels +

Your Documents Are Ready!

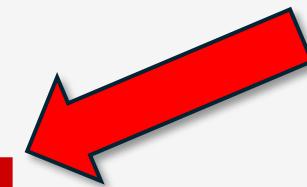
Dear Max Fun,

Hello Your Documents are ready and this comes from the CP from the CP area, not the SubmitDocument!!!!!! at Client level

Please click on the link below to start signing:

These are your documents:  
0002-Max Fun-Zoom-Annual-Insurance-Update-Form 2024-09-19

Please click on this link:

 **Sign Documents**



Logout

## Welcome Back, Max Fun!

You've been asked to review and sign documents online. It's easy!

To get started, you need to agree to receive electronic documents using the electronic signature service under the terms of the E-Sign Legal Consent by choosing **Accept** below. This will confirm that you are able to access all of the documents provided to you in electronic form and you agree to be bound by the [terms of service](#).

Click **Next** to continue!

Agree to Legal Consent and Terms of Service?  Accept  Decline

[Read Legal Consent](#)



[Next](#)





## Max, Please Log In

Please enter the password you previously created in order to log in. If you've forgotten your password, click [Forgot My Password](#).

[Forgot My Password](#)

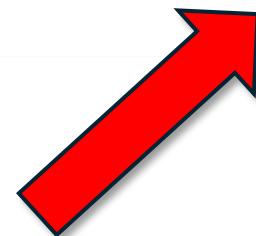
Enter your password

.....



I wish to update my signature/initials

Next





My Progress

0002-Max Fun-Zoom-Annual-Insurance-Update-Form 2024-09-19



Logout

## Ready To Review and Sign?

Select **Go** to jump right to your first action and let us guide you through the document. If you'd rather go at your own pace, choose **Let Me Review**. Simply scroll or use the **NEXT** and **PREV** buttons at the bottom corners of the screen to jump to unfinished signatures and other tasks.

[Let Me Review](#)[Go!](#)

Arlington, TX 76001

### Annual Request for Updated Insurance Details

As part of our annual compliance and safety procedures, we kindly request that you provide updated insurance details for the Jet Pack(s) you have currently leased.

Please provide the following information:

Name of Insurance Company:

Policy Number:

Insurance Company Phone:

PREV

NEXT

IN PURPOSE  
on or transac

Date:

9/19/2024

To:

Max Fun

100 Pocket St

Arlington, TX 76001

Pre-filled

**Annual Request for Updated Insurance Details**

As part of our annual compliance and safety procedures, we kindly request that you provide updated insurance details for the Jet Pack(s) you have currently leased.

Please provide the following information:

Name of Insurance Company:

Policy Number:

Insurance Company Phone:



My Progress

0002-Max Fun-Zoom-Annual-Insurance-Update-Form 2024-09-19



Save

Logout

Date: 9/19/2024

To: Max Fun

100 Pocket St

Arlington, TX 76001

**Annual Request for Updated Insurance Details**

As part of our annual compliance and safety procedures, we kindly request that you provide updated insurance details for the Jet Pack(s) you have currently leased.

Please provide the following information:

Name of Insurance Company: Flyco Insurance, Inc.

Policy Number: ABC-3948-203485

Insurance Company Phone: 555-847-5600

Equipment Coverage Limit: 120,000

Liability Coverage Limit: 1,000,000

Deductible: 500

Policy Period: 12 months

Start Date: 8/20/2024

End Date: 8/19/2025

By signing below, you are confirming that **Zoom Jet Packs** is listed as an additional insured on the policy and that the information supplied above is correct.

We kindly request that you submit the updated insurance details by the following date:

10/19/2024

Data submitted



Date: Signed Date

Lessee signature:



PREV

NEXT



My Progress

0002-Max Fun-Zoom-Annual-Insurance-Update-Form 2024-09-19



Save

Logout

Date: 9/19/2024  
To: Max Fun  
100 Pocket St  
Arlington, TX 76001



#### Annual Request for Updated Insurance Details

As part of our annual compliance and safety procedures, we kindly request that you provide updated insurance details for the Jet Pack(s) you have currently leased.

Please provide the following information:

Name of Insurance Company: Flyco Insurance, Inc.  
Policy Number: ABC-3948-203485  
Insurance Company Phone: 555-847-5600  
Equipment Coverage Limit: 120,000  
Liability Coverage Limit: 1,000,000  
Deductible: 500  
Policy Period: 12 months  
Start Date: 8/20/2024  
End Date: 8/19/2025

By signing below, you are confirming that **Zoom Jet Packs** is listed as an additional insured on the policy and that the information supplied above is correct.

We kindly request that you submit the updated insurance details by the following date:

10/19/2024

Signed



Lessee signature:

Danger Fun

Date: Signed Date

PREV

NEXT



Max, thanks for signing online!

You have successfully completed all required actions.

Thank you for submitting your signature online.

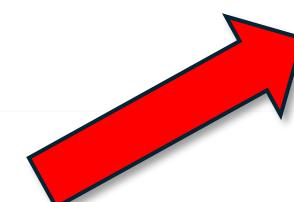
Want to bring the speed & security of  
digital signatures to your business?

Click here to find out more!



[Close](#)

[Review](#)



Thank you for submitting

SIGNiX

webtest.signix.biz/ui/uxr3/signing/index.jsp

**SIGNiX**

Date: 9/19/2024

To: Max Fun  
100 Pocket St  
Arlington, TX 76001



**Annual Request for Updated Insurance Details**

As part of our annual compliance and safety procedures, we kindly request that you provide updated insurance details for the Jet Pack(s) you have currently leased.

Please provide the following information:

Name of Insurance Company:	Flyco Insurance, Inc.
Policy Number:	ABC-3948-203485
Insurance Company Phone:	555-847-5600
Equipment Coverage Limit:	120,000
Liability Coverage Limit:	1,000,000
Deductible:	500
Policy Period:	12 months
Start Date:	8/20/2024
End Date:	8/19/2025

By signing below, you are confirming that **Zoom Jet Packs** is listed as an additional insured on the policy and that the information supplied above is correct.

We kindly request that you submit the updated insurance details by the following date:

10/19/2024

Lessee signature: *Max Danger Fun*



Date: 09/27/2024 12:57 PM EDT

**Review Complete**

This document is for DEMONSTRATION PURPOSES only and is not intended for actual person or transaction.

SIGNiX

MyDox Client - Workgroup SDD

Show 10 entries

Last Updated

moments ago

2 hours ago

3 hours ago

20 hours ago

Showing 1 to 4 of 4 entries

© 2023, SIGNiX, INC.

## Mass Mailer Summary

Name : Annual Insurance Request Test Run 5

Status : Completed

Submitter : !!Demo!!KMatthews6490

CSV : Annual-Insurance-Request-test1-2024.csv [Download](#)

### Individual Transactions

Transaction Name	Date Created	Status
Annual_Ins_Req_1_Max_Fun	2024-09-27 12:55:32.0	Complete

Search: |

Previous 1 Next

[Close](#) [Report](#)

Logout

Create New Transaction

ne:

TERMS OF SERVICE NS12 - PRIVACY POLICY



SIGNiX

webtest.signix.biz/ui/uxr3/documentDashboard/index.jsp?s=signix&c=mydox&u=%21%21Demo%21%21KMatthews6490&w=SDD&nosso=true

Logout

# Mass Mailer Report

Name : Annual Insurance Request Test Run 5

Files included :  The signed docs  Audit log  Certificate of completion  CSV file with entered form data

Last Updated

moments ago

2 hours ago

3 hours ago

Annual Insurance Request Test Run 2

Suspended/Cancelled

20 hours ago

Zoom Annual Insurance Update - Test 1

Completed

Show 10 entries

Close Report

Previous 1 Next

SIGNiX Settings webtest.signix.biz/ui/uxr3/documentDashboard/index.jsp?s=signix&c=mydox&u=%21%21Demo%21%21KMatthews6490&w=SDD&nosso=true

Logout

## Mass Mailer Summary

Name : Annual Insurance Request Test Run 5

Status : Completed

Submitter : !!Demo!!KMatthews6490

CSV : Annual-Insurance-Request-test1-2024.csv [Download](#)

Last Updated

Show 10 entries

Save As

Organize New folder

Name Status Date modified Type

Name	Status	Date modified	Type
Screenshots	✓	8/29/2024 6:32 AM	File folder
Zoom-00001-PDFDocuments	✓	7/11/2024 3:05 PM	File folder

Search:

Status: Complete

Previous 1 Next

Close Report

File name: Annual Insurance Request Test Run 5

Save as type: Compressed (zipped) Folder

Save Cancel

Hide Folders

Mass Mailer | ENotary Profile

Create New Transaction

ne:

Previous 1 Next

TERMS OF SERVICE VS12 - PRIVACY POLICY

SIGNIX Settings Logout

webtest.signix.biz/ui/uxr3/documentDashboard/index.jsp?s=signix&c=mydox&u=%21%21Demo%21%21KMatthews6490&w=SDD&nosso=true

MyDox Client - Workgroup SDD

Show 10 entries

Last Updated

moments ago

2 hours ago

3 hours ago

20 hours ago

Showing 1 to 4 of 4 entries

© 2023, SIGNIX, INC.

## Mass Mailer Summary

**Name :** Annual Insurance Request Test Run 5

**Status :** Completed

**Submitter :** !!Demo!!KMatthews6490

**CSV :** Annual-Insurance-Request-test1-2024.csv [Download](#)

**Individual Transactions**

Transaction Name	Date Created	Status
Annual_Ins_Req_1_Max_Fun	2024-09-27 12:55:32.0	Complete

Previous 1 Next

[Close](#) [Report](#)

Annual Insurance Request Test Run 5.zip  
194 KB • Done

s | Mass Mailer | ENotary Profile

Create New Transaction

ne:

Previous 1 Next

Previous 1 Next

TERMS OF SERVICE VS12 - PRIVACY POLICY

Zoom Jet Packs

OneDrive > Karl - ProNvest, Inc > Documents > MyDoX > Sandbox > Zoom Jet Packs >

Search Zoom Jet Packs

New Sort View Extract all ...

Home  
Gallery  
Karl - ProNvest, Inc  
Desktop  
Downloads  
Documents  
Pictures  
Music  
Videos  
Zoom Jet Packs  
eVault  
Sandbox  
Screenshots  
This PC  
Network  
Linux  
docker-desktop  
docker-desktop-d  
Ubuntu

Name Status Date modified Type Size

Annual Insurance Request Test Run 5 ✓ 9/27/2024 1:03 PM Compressed (zipp...) 194 KB

Annual-Insurance-Request-test1-2024 ✓ 9/27/2024 9:48 AM Microsoft Excel Co... 1 KB

Zoom Jet Packs Recall Notice 2024-09-20 ✓ 9/20/2024 4:57 PM Adobe Acrobat D... 16 KB

Zoom Jet Packs Recall Notice 2024-09-20 ✓ 9/20/2024 4:57 PM Microsoft Word D... 13 KB

Annual-Recall-Notice-test1-2024 ✓ 9/20/2024 4:41 PM Microsoft Excel Co... 1 KB

Annual-Insurance-Request-2024 ✓ 9/20/2024 10:10 AM Microsoft Excel Co... 2 KB

Zoom-Annual-Insurance-Update-Form 2024-... ✓ 9/19/2024 9:41 AM Adobe Acrobat D... 65 KB

Zoom-Annual-Insurance-Update-Form 2024-... ✓ 9/19/2024 9:41 AM Microsoft Word D... 220 KB

Text Tagging Article 2024-09-17 ✓ 9/17/2024 9:47 AM Microsoft Word D... 131 KB

Zoom-Change-Of-State-Form-2024-08-29 ✓ 8/29/2024 5:04 PM Microsoft Word D... 16 KB

Zoom-Jet-Packs-Logo-transparent-background... ✓ 8/21/2024 4:05 PM PNG File 226 KB

Zoom Safety Advisory ✓ 7/29/2024 9:33 AM Adobe Acrobat D... 135 KB

Zoom Safety Advisory - Signed ✓ 7/28/2024 5:52 PM Adobe Acrobat D... 228 KB

Zoom Safety Advisory Untagged ✓ 7/28/2024 5:49 PM Adobe Acrobat D... 129 KB

Zoom Jet Pack Lease - Signed ✓ 7/28/2024 5:07 PM Adobe Acrobat D... 166 KB

Zoom-Jet-Pack-Clothing-Ad-and-Button (Cus... ✓ 7/26/2024 3:43 PM PNG File 81 KB

Inspirational Poster ✓ 7/25/2024 8:57 PM JPG File 225 KB

Zoom Jet Packs Clothing-Ad-and-Button ✓ 7/25/2024 1:28 PM Microsoft PowerPo... 627 KB

Zoom-Jet-Pack-Clothing-Ad-and-Button ✓ 7/25/2024 1:06 PM PNG File 2,243 KB

Jet Pack Clothing Ad ✓ 7/25/2024 12:01 PM PNG File 2,260 KB

Jet Pack Clothing Ad ✓ 7/25/2024 11:47 AM IPG File 199 KB

Open  
Open in new tab  
Open in new window  
Pin to Quick access  
Add to Favorites  
Open with Code  
Always keep on this device  
Free up space  
Share  
Copy Link  
Manage access  
View online  
Version history  
Extract All...  
Pin to Start  
Scan with Microsoft Defender...  
Open with...  
Give access to  
Copy as path  
Unlock with File Locksmith  
Share  
Rename with PowerRename  
Restore previous versions  
Send to  
Cut  
Copy  
Create shortcut  
Delete  
Rename  
Properties

Details

Annual Insurance Request Test

OneDrive > ... Documents > MyDoX > Sandbox > Zoom Jet Packs > Annual Insurance Request Test Run 5

Search Annual Insurance Request Test Run 5

New | Sort | View | Details

Name	Status	Date modified	Type	Size
0002-Max Fun-Zoom-Annual-Insurance-Update-Form 2024-09-19	✓	9/27/2024 1:14 PM	Adobe Acrobat D...	157 KB
AuditTrail_Annual_Ins_Req_1_Max_Fun	✓	9/27/2024 1:14 PM	Adobe Acrobat D...	81 KB
CertificateOfCompletion_Annual_Ins_Req_1_Max_Fun	✓	9/27/2024 1:14 PM	Adobe Acrobat D...	88 KB
MassMailer Report_Annual Insurance Request Test Run 5	✓	9/27/2024 1:14 PM	Microsoft Excel Co...	2 KB

Home  
Gallery  
Karl - ProNvest, Inc  
Desktop  
Downloads  
Documents  
Pictures  
Music  
Videos  
Zoom Jet Packs  
eVault  
Sandbox  
Screenshots

This PC  
Network  
Linux  
docker-desktop  
docker-desktop-d  
Ubuntu

4 items

This document is for informational purposes only and is not intended for actual person or transaction.

Annual Insurance Request Test

OneDrive > Documents > MyDoX > Sandbox > Zoom Jet Pac

New ▾

Home

Gallery

Karl - ProNvest, Inc

Desktop

0002-Max Fun-Zoom-Annual-Insurance-Update-Form 2024-09-19

AuditTrail\_Annual\_Ins\_Req\_1\_Max\_Fun

CertificateOfCompletion\_Annual\_Ins\_Req\_1\_Max\_Fun

MassMailer Report\_Annual Insurance Request Test Run 5

0002-Max Fun-Zoom-Annual-Insurance-Update-Form 2024-09-19

AuditTrail\_Annual\_Ins\_Req\_1\_Max\_Fun

TotalAudit™ Certification of Completion

1 / 1

51%

SIGNiX

TotalAudit™ Certificate of Completion

Transaction Information

Transaction Name: Annual\_Ins\_Req\_1\_Max\_Fun

Company: MyDoX Client

Document Set ID: 1922ec0166-6e08-34bf1d2-2be52

Transaction ID: MM-00001....2024-09-27 12:55:31:283

Demo: Yes

Document(s): 0002-Max Fun-Zoom-Annual-Insurance-Update-Form 2024-09-19

Signer(s): Max Fun - signixkarl@gmail.com

Transaction Start: 09-27-2024, 04:55:32 PM GMT

Transaction Complete: 09-27-2024, 04:57:25 PM GMT

0002-Max Fun-Zoom-Annual-Insurance-Update-Form 2024-09-19

AuditTrail\_Annual\_Ins\_Req\_1\_Max\_Fun

1 / 48

36%

Session Started: 2024-09-27 04:48:31 PM GMT

Session Id: W/1212/19234625288/C1A05766

Remote IP Address: 69.169.141.175

User Agent: Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/129.0.0.0 Safari/537.36

Session Started: 2024-09-27 04:53:43 PM GMT

Session Id: W/1212/1923467126E/645175A4

Remote IP Address: 69.169.141.175

User Agent: Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/129.0.0.0 Safari/537.36

Transaction Accepted by Signix: #IDemo!KMatthews6490

Document Set Id: 1922ec0166-6e08-34bf1d2-2be52

Transaction ID: MM-00001....2024-09-27 12:55:31:283

Transaction Name: Annual\_Ins\_Req\_1\_Max\_Fun

Sponsor: mydox

Service Type: SDDC

Submitter: Karl Matthews

Submitter Email: kmatthews@signix.com

Ref Id: #IDemo!KMatthews6490

Parties

Party Name	Party Id	Party Email	Authentication Method	Party Mobile
Max Fun	signixkarl@gmail.com	signixkarl@gmail.com	SelectOneClick	

Documents

Document Id	Document RefId	Document Title
PDF-1922ec0166-6e08-34bf1d2-2be52		0002-Max Fun-Zoom-Annual-Insurance-Update-Form 2024-09-19

Submitting Agent:

Date	Email Sent	Ref Id
2024-09-27 04:55:32 PM GMT	Email Sent	#IDemo!KMatthews6490
Session Id		W/1212/19234625288/C1A05766

Annual Insurance Request Test

OneDrive > ... Documents > MyDoX > Sandbox > Zoom Jet Packs > Annual Insurance Request Test Run 5

Search Annual Insurance Request Test Run 5

New ▾ Sort ▾ View ▾ Details

Name	Status	Date modified	Type	Size
0002-Max Fun-Zoom-Annual-Insurance-Update-Form 2024-09-19	✓	9/27/2024 1:14 PM	Adobe Acrobat D...	157 KB
AuditTrail_Annual_Ins_Req_1_Max_Fun	✓	9/27/2024 1:14 PM	Adobe Acrobat D...	81 KB
CertificateOfCompletion_Annual_Ins_Req_1_Max_Fun	✓	9/27/2024 1:14 PM	Adobe Acrobat D...	88 KB
MassMailer Report_Annual Insurance Request Test Run 5	✓	9/27/2024 1:14 PM	Microsoft Excel Co...	2 KB

MassMailer Report\_Annual Insurance Request Test Run 5

File Edit View

```
Name,Submitter,CsvFileName,Status,TransactionName,TransactionCreateDate,TransactionStatus,PartyName_0,PartyEmail_0,PartyService_0,D01_FF_Text_1727452860330,D01_FF_Text_1727452895120_ShortDesc,D01_FF_Text_1727452974549,D01_FF_Text_1727452779405,D01_FF_Text_1727453018735,D01_FF_Text_1727452803487,D01_FF_Text_1727452926480_ShortDesc,D01_FF_Text_1727452589648_ShortDesc,D01_FF_Text_1727452825535_ShortDesc,D01_FF_Text_1727452941134_ShortDesc,D01_FF_Text_1727452895120,D01_FF_Text_1727452878976_ShortDesc,D01_FF_Text_1727452860330_ShortDesc,D01_FF_Text_1727452926480,D01_FF_Text_1727453018735_ShortDesc,D01_FF_Text_1727452959258_ShortDesc,D01_FF_Text_1727452779405_ShortDesc,D01_FF_Text_1727452589648,D01_FF_Text_1727452825535,D01_FF_Text_1727452959258,D01_FF_Text_1727452909311,D01_FF_Text_1727452974549_ShortDesc,D01_FF_Text_1727453007437_ShortDesc,D01_FF_Text_1727452909311_ShortDesc,D01_FF_Text_1727453007437,D01_FF_Text_1727452941134,D01_FF_Text_1727452803487_ShortDesc,D01_FF_Text_1727452878976,  
Annual Insurance Request Test Run 5,!!Demo!!KMatthews6490,Annual-Insurance-Request-test1-2024.csv,Completed,Annual_Ins_Req_1_Max_Fun,2024-09-27 12:55:32.0,1 of 1,Max Fun,email@example.com,SelectOneClick,"Flyco Insurance, Inc.",insurerPhone,8/20/2024,Max Fun,10/19/2024,100 Pocket St,coverageLiability,dateSent,lesseeAddr2,deductible,555-847-5600,policyNum,insurerName,"1,000,000",provideByDate,policyPeriod,lesseeName,9/19/2024,"Arlington, TX 76001",12 months,"120,000",startDate,endDate,coverageEquipt,8/19/2025,500,lesseeAddr1,ABC-3948-203485,
```

Ln 2, Col 177 | 1 of 1,545 characters | 100% | Unix (LF) | UTF-8

4 items | 1 item selected 1.51 KB | Available on this device

AutoSave Off MassMailer Report\_Annual Insurance Request Test R... • Saved to this PC

Search

File Home Insert Draw Page Layout Formulas Data Review View Automate Help

Comments Share

Paste **Aptos Narrow** 11 A<sup>+</sup> A<sup>-</sup> Wrap Text General Conditional Formatting **Format as Table** Cell Styles Insert Delete Format Sort & Filter Find & Select Sensitivity Add-ins Analyze Data

Font Alignment Number Styles Cells Editing Sensitivity Add-ins

A1 Name

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
1 Name	Submitter	CsvFileName	Status	Transaction	Transaction	Transaction	PartyName	PartyEmail	PartyService	D01_FF_Te	D01_FF_Te	D01_FF_Te	D01_FF_Te	D01_FF_Te	D01_FF_Te	D01_FF_Te	D01_FF_Te	D01_FF_Te	D01_FF_Te	D01_FF_Te	D01_FF_Te	
2 Annual Ins	!!Demo!!K	Annual-Ins Complete	c tec Annual_Ins	55:32.0	1 of 1	Max Fun	signixkarl@SelectOne	Flyco	Insur	insurerPhc #####	Max Fun	#####	100	Pocke	coverageL	dateSent	lesseeAdd	deductible	555-847-5	policyNum	insurerNar	1,0
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MassMailer Report\_Annual Insur +

Ready Accessibility: Unavailable

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# Transforming the MassMailer Report

- Output from the MassMailer has columns for both tag names and tag values
- Transformation to simply named columns can be performed in Excel, using Power Query
- An Excel file with a general-purpose transformation script is available on GitHub
  - This file has an INPUT tab and an OUTPUT tab
- Download the Excel file and copy it to your report folder
- Open the Report.csv file and copy all the data
- Paste the data “as values” at row A1 in the INPUT tab
  - The table will automatically size to fit the pasted data
- Open the OUTPUT tab, and right-click on the green table. Select **Refresh**
- The OUTPUT tab should now show the data in simple named columns
  - It may be necessary to format date columns, etc., prior to further processing

Annual Insurance Request Test

OneDrive > Documents > MyDoX > Sandbox > Zoom Jet Packs > Annual Insurance Request Test Run 5

Search Annual Insurance Request Test Run 5

New Sort View ...

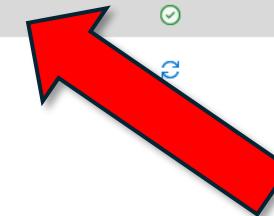
Home  
Gallery  
Karl - ProNvest,  
Desktop  
Downloads  
Documents  
Pictures  
Music  
Videos  
Zoom Jet Pac  
Sandbox  
Annual Insur  
Annual Insur  
This PC  
Network  
Linux  
docker-deskt  
docker-deskt  
Ubuntu

Name Status Date modified Type Size

Name	Status	Date modified	Type	Size
0002-Max Fun-Zoom-Annual-Insurance-Update-Form 2024-09-19	✓	9/27/2024 1:14 PM	Adobe Acrobat D...	157 KB
AuditTrail_Annual_Ins_Req_1_Max_Fun	✓	9/27/2024 1:14 PM	Adobe Acrobat D...	81 KB
CertificateOfCompletion_Annual_Ins_Req_1_Max_Fun	✓	9/27/2024 1:14 PM	Adobe Acrobat D...	88 KB
MassMailer Report Transform 2024-09-27	✓	9/27/2024 3:40 PM	Microsoft Excel W...	23 KB
MassMailer Report_Annual Insurance Request Test Run 5	⟳	9/27/2024 1:14 PM	Microsoft Excel Co...	2 KB

Details

5 items | 1 item selected 22.6 KB | Available on this device



AutoSave On MassMailer Report Transform 2024-0... • Last Modified: 12m ago

File Home Insert Draw Page Layout Formulas Data Review View Automate Help

Comments Share

Paste Aptos Narrow 11 A<sup>+</sup> A<sup>-</sup> Wrap Text General Conditional Format as Cell Styles Insert Delete Format Sort & Filter Find & Select Sensitivity Add-ins Analyze Data

Font Alignment Number Styles Cells Editing Sensitivity Add-ins

I6

A B C D E F G H I J K L

1 Name Submitter CsvFileName Status TransactionName TransactionCreateDate TransactionStatus PartyName\_0 PartyEmail\_0 PartyService\_0 D01\_FF\_Text\_1726756564746\_ShortDesc D01\_FF\_Text\_1726756564746

2 DATA COL 1 NAME DATA COL 1 VALUE

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INPUT OUTPUT +

Ready Accessibility: Investigate

**Copy/Paste values**

The image shows two Microsoft Excel windows side-by-side. The left window is titled 'MassMailer Report\_Annual Insur' and has its status bar set to 'AutoSave Off'. The right window is titled 'Mass... Last Modified: 13m a...' and has its status bar set to 'AutoSave On'. Both windows have the 'Home' tab selected in the ribbon. The 'INPUT' tab is active in the bottom navigation bar of the left window, while the 'OUTPUT' tab is active in the bottom navigation bar of the right window. A large red arrow originates from the 'INPUT' tab of the left window and points diagonally upwards and to the right towards the 'OUTPUT' tab of the right window. The text 'Copy/Paste values' is overlaid in white on the red arrow.

MassMailer... • Saved to this PC

AutoSave Off

Mass... • Last Modified: 13m a...

AutoSave On

Clipboard Font Alignment % Conditional Formatting Format as Table Cell Styles Cells Sensitivity Add-ins

Clipboard Font Alignment % Conditional Formatting Format as Table Cell Styles Cells Sensitivity Add-ins

A1 Name Submitter CsvFileName Status TransactionName TransactionType PartyName PartyEmail PartyService D01\_FF\_Te D01\_FF\_Te

1 Annual Ins !!Demo!!K Annual-Ins Completec Annual\_Ins 55:32.0 1 of 1 Max Fun signixkarl@SelectOne Flyco Insur in

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MassMailer Report\_Annual Insur

Average: 168576.5673 Count: 76 Sum: 1348612.539

INPUT

OUTPUT

Ready Accessibility: Investigate

Clipboard Font Alignment % Conditional Formatting Format as Table Cell Styles Cells Sensitivity Add-ins

Clipboard Font Alignment % Conditional Formatting Format as Table Cell Styles Cells Sensitivity Add-ins

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INPUT

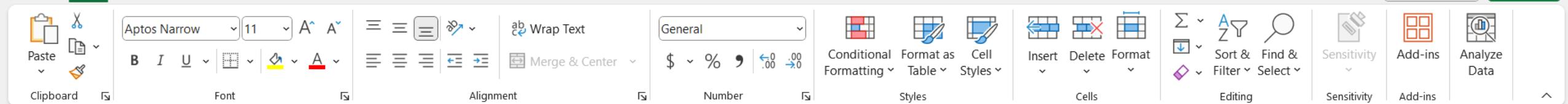
OUTPUT

Ready Accessibility: Investigate

The image displays two Microsoft Excel windows side-by-side, illustrating a data transfer process.

**Left Window (Source):** This window shows a table titled "MassMailer Report\_Annual Insur". The table has columns labeled: Name, Submitter, CsvFileName, Status, TransactionName, TransactionID, TransactionCreateDate, PartyName, PartyEmail, PartyService, and D01\_FF\_TeD. Row 1 contains the column headers, and row 2 contains sample data: "Annual Insur" and "!!Demo!!K Annual-Ins Completec Annual\_Ins 55:32:0 1 of 1 Max Fun signixkarl@SelectOne Flyco Insur in". The status cell in row 2 is highlighted in yellow.

**Right Window (Destination):** This window shows the same table being pasted into another Excel sheet. A "Paste Options" menu is open above the destination cell, displaying several icons: Values (highlighted with a red circle), Formulas, Values and Number Formats, Values and Comments, and Values and Number Formats (with comments). The destination table has columns: Status, TransactionName, TransactionCreateDate, and TransactionStatus. Row 1 contains the column headers, and row 2 contains sample data: "Annual Insur" and "!!Demo!!K Ma Annual-Insurance Completec Annual\_Ins\_Req\_1\_Ma 9/27/2024 12:55:32 PM 1 of 1".



A1

Name ✓ Submitter ✓ CsvFileName ✓ Status ✓ TransactionName ✓ TransactionCreateDate ✓ TransactionStatus ✓ PartyName\_0 ✓ PartyEmail\_0 ✓ PartyService\_0 ✓ D01\_FF\_Text\_1727452860330 ✓ D01\_FF\_Text\_1727452895120

1 Annual Insur !!Demo!!KMa Annual-Insurance Completec Annual\_Ins\_Req\_1\_Ma 9/27/2024 12:55:32 PM 1 of 1 Max Fun signixkarl@gmail.com SelectOneClick Flyco Insurance, Inc.

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INPUT OUTPUT +

## INPUT

## OUTPUT

+

Screenshot of a Google Sheets spreadsheet showing a single row of data.

The spreadsheet has columns labeled F through R. The first two rows contain data, while rows 3 through 30 are blank.

Row 1 (Header Row):

- F1: TransactionCreateDate
- G1: TransactionStatus
- H1: PartyName\_0
- I1: PartyEmail\_0
- J1: PartyService\_0
- K1: DATA COL 1 NAME
- L1: (empty)
- M1: (empty)
- N1: (empty)
- O1: (empty)
- P1: (empty)
- Q1: (empty)
- R1: (empty)

Row 2 (Data Row):

- F2: (empty)
- G2: (empty)
- H2: (empty)
- I2: (empty)
- J2: (empty)
- K2: DATA COL 1 VALUE
- L2: (empty)
- M2: (empty)
- N2: (empty)
- O2: (empty)
- P2: (empty)
- Q2: (empty)
- R2: (empty)

Rows 3 through 30 are completely blank.

MassMailer Report Transform 2024-0... • Saved

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INPUT OUTPUT

Search

Wrap Text

Merge & Center

General

Conditional Formatting

Format as Table

Cell Styles

Insert

Delete

Format

Sort & Filter

Find & Select

Sensitivity

Add-ins

Analyze Data

Comments Share

Cut

Copy

Paste Options:

- Paste Special...
- Smart Lookup
- Refresh
- Insert
- Delete
- Select
- Clear Contents
- Quick Analysis
- Sort
- Filter
- Table
- Get Data from Table/Range...
- New Comment
- New Note
- Format Cells...
- Pick From Drop-down List...
- Link
- Open Hyperlink
- Link to this Range
- Show Changes

J K L M N O P Q R

L\_0 PartyService\_0 DATA COL 1 NAME  
DATA COL 1 VALUE

AutoSave On KM

Accessibility: Investigate

100%



# MassMailer Data Collection - Recap

- Used a form created in MS Word and exported as a PDF
- Created a CSV of data, containing:
  - Prefilled / personalized data
  - Columns for collecting data
- Created a MassMailer transaction
  - Uploaded CSV
  - Tagged the document
  - Submitted the transactions to signers
- Collected data and signatures
- Downloaded results and prepared them for further processing / analysis

# Templates and Reuse

# Templates

- Transaction templates enable reuse
  - Remembers documents and field/signature tags, etc.
- Save As a template, prior to Send
- Open template from Templates page
- Replace CSV with file with same columns
- Send All
- Track responses
- Download data and documents collected

Signers

Documents

Signatures

Send

Status

Demonstration Mode?

 Yes  No

Lock Template?

 Yes  No

## Email Message

Your documents are available online for viewing and signing.

## Reminders/Expiration Schedule

Drag the slider to choose when documents expire and reminders are sent to all signers. You can choose to send no reminders.

*The documents will expire after 10 day(s), and signer(s) will receive reminders on day(s) 3 and 7*

 I do not want to send reminders to signer(s)

Clicking Send All will start the MassMailer process and send notifications to the 1 recipients shown on the Signers tab. Be sure to double check all of your information prior to starting the MassMailer.

[Previous](#)[Send All](#)

Annual Insurance Request Test Run 4

1 Mass Mailer Recipients

## Transaction Name

Annual\_Ins\_Req\_1\_Max\_Fun

Your CSV  
provideBy

Delete CSV

Replace CSV

Download CSV

## Save As

## Title

Annual Insurance Request Template

## Description

Template for collecting annual insurance details from lessees

New Template

New Transaction



Next

Filter All Templates ▾

[Create New Transaction](#)

Show 10 ▾ entries

Search name:  Advanced

<input type="checkbox"/>	Created	Last Updated	Name	Owner
<input type="checkbox"/>	moments ago	moments ago	Annual Insurance Request Template	mydox
<input type="checkbox"/>	Sep 27 2024 12:04 PM	Sep 27 2024 12:06 PM	Annual Insurance Request Test Run 4	mydox
<input type="checkbox"/>	May 9 2024 03:19 PM	Sep 27 2024 10:37 AM	Testing standup MM	mydox
<input type="checkbox"/>	Sep 26 2024 04:26 PM	Sep 27 2024 08:57 AM	Zoom Annual Insurance Update	mydox
<input type="checkbox"/>	Sep 20 2024 04:39 PM	Sep 20 2024 04:39 PM	try mm test template 1	mydox
<input type="checkbox"/>	Sep 20 2024 04:37 PM	Sep 20 2024 04:38 PM	MM test template 1	mydox
<input type="checkbox"/>	Sep 17 2024 11:28 AM	Sep 17 2024 12:22 PM	Sig 2281 SDD Template 2	mydox
<input type="checkbox"/>	Sep 17 2024 11:27 AM	Sep 17 2024 12:10 PM	Sig 2281 SDD Template 1	mydox
<input type="checkbox"/>	Sep 12 2024 04:35 PM	Sep 12 2024 04:37 PM	Pershing 2279 template	mydox
<input type="checkbox"/>	Sep 10 2024 11:27 AM	Sep 10 2024 11:29 AM	Liwens test Document Set: temp 9/10 2	mydox

Showing 1 to 10 of 1,000 entries

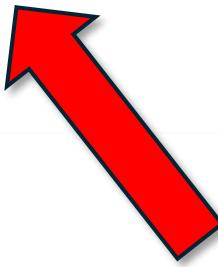
Previous **1** 2 3 4 5 ... 100 Next

Annual Insurance Request Template

1 Mass Mailer Recipients

Transaction Name	First Name	Last Name	Email	Authentication
Annual_Ins_Req_1_Max_Fun	Max	Fun	signixkarl@gmail.com	SelectOneClick

Your CSV file has extra fields that must be placed as text fields on the document(s): lesseeAddr2, coverageEquipt, endDate, lesseeAddr1, insurerName, policyPeriod, provideByDate, coverageLiability, insurerPhone, deductible, lesseeName, policyNum, dateSent, startDate

[Delete CSV](#) [Replace CSV](#) [Download CSV](#)[Next](#)

Annual Insurance Request Template

1 Mass Mailer Recipients

## Transaction Name

Annual\_Ins\_Req\_1\_Max\_Fun

Delete CSV

Replace CSV

Download CSV

Your CSV  
provideBy

## Remove Tasks

All non-MassMailer signers and their respective tasks will be deleted. Do you want to continue?

Cancel

Yes, Remove All Tasks



## Authentication

SelectOneClick

Next

Annual Insurance Request Template

1 Mass Mailer Recipients

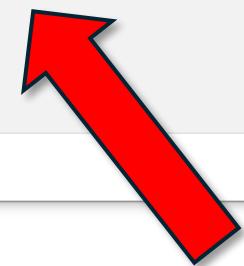
## Transaction Name

Annual\_Ins\_Req\_1\_Max\_Fun

[Delete CSV](#)[Replace CSV](#)[Download CSV](#)Your CSV  
provideBy

## Upload Recipient List

Upload a .CSV file, formatted to SIGNiX requirements, and click OK.

 No file chosen

Name, policyPeriod,

[Next](#)

Annual Insurance Request Template

1 Mass Mailer Recipients

## Transaction Name

Annual\_Ins\_Req\_1\_Max\_Fun

[Delete CSV](#)[Replace CSV](#)[Download CSV](#)Your CSV  
provideBy

## Upload Recipient List

Upload a .CSV file, formatted to SIGNiX requirements, and click OK.

 Annual-Insurance-Request-2024.csv

Name, policyPeriod,

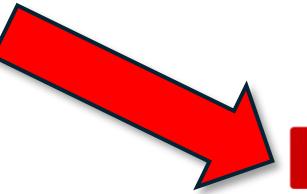
  
[Next](#)

Annual Insurance Request Template

9 Mass Mailer Recipients

Transaction Name	First Name	Last Name	Email	Authentication
Annual_Ins_Req_1_Max_Fun	Max	Fun	signixkarl@gmail.com	SelectOneClick
Annual_Ins_Req_2_Sam_Smith	Sam	Smith	signixkarl+2@gmail.com	SelectOneClick
Annual_Ins_Req_3_Lucy_Jones	Lucy	Jones	signixkarl+3@gmail.com	SelectOneClick
Annual_Ins_Req_4_Jake_Brown	Jake	Brown	signixkarl+4@gmail.com	SelectOneClick
Annual_Ins_Req_5_Emma_Green	Emma	Green	signixkarl+5@gmail.com	SelectOneClick
Annual_Ins_Req_6_Liam_Taylor	Liam	Taylor	signixkarl+6@gmail.com	SelectOneClick
Annual_Ins_Req_7_Ava_Wilson	Ava	Wilson	signixkarl+7@gmail.com	SelectOneClick
Annual_Ins_Req_8_Noah_Moore	Noah	Moore	signixkarl+8@gmail.com	SelectOneClick
Annual_Ins_Req_9_Ethan_Hall	Ethan	Hall	signixkarl+9@gmail.com	SelectOneClick

Your CSV file has extra fields that must be placed as text fields on the document(s): lesseeAddr2, coverageEquipt, endDate, lesseeAddr1, insurerName, policyPeriod, provideByDate, coverageLiability, insurerPhone, deductible, lesseeName, policyNum, dateSent, startDate

[Delete CSV](#) [Replace CSV](#) [Download CSV](#)Next

[Upload Documents](#)

Click the button or drag and drop files from your computer here

Order	Document Name	
1	Zoom-Annual-Insurance-Update-Form 2024-09-19	

Showing 1 to 1 of 1 entries

[Move Down](#)[Move Up](#)

&gt; Signer Attachments

[Previous](#)[Next](#)

POLICY PERIOD.

Start Date:	
End Date:	

By signing below, you are confirming that **Zoom Jet Packs** is listed as an additional insured on the policy and that the information supplied above is correct.

We kindly request that you submit the updated insurance details by the following date:

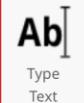
--

Lessee signature:

Placeholder1
--------------

Date: 

MM/dd/yyyy
------------



End Document

Previous

Next



Demonstration Mode?

Yes  No

Lock Template?

Yes  No

#### Email Message

Your documents are available online for viewing and signing.

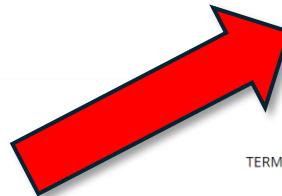
#### Reminders/Expiration Schedule

Drag the slider to choose when documents expire and reminders are sent to all signers. You can choose to send no reminders.

*The documents will expire after 10 day(s), and signer(s) will receive reminders on day(s) 3 and 7*

I do not want to send reminders to signer(s)

**Clicking Send All will start the MassMailer process and send notifications to the 9 recipients shown on the Signers tab. Be sure to double check all of your information prior to starting the MassMailer.**

[Previous](#)[Send All](#)

Demonstration Mode?

 Yes  No

Lock Template?

 Yes  No

## Email Message

Your documents are available online for viewing and signing.

## Reminders/Expiration Schedule

Drag the slider to choose when documents expire and reminders

 I do not want to send reminders to signer(s)

Clicking Send All will start the MassMailer process and send notifications to the 9 recipients shown on the Signers tab. Be sure to double check all of your information prior to starting the MassMailer.

[Previous](#)[Send All](#)

## Start MassMailer

New MassMailer Name

Annual Insurance Request 2024

OK

The documents will expire after 10 days. The signer(s) will receive reminders on day(s) 3 and 7

## Mass Mailer Status

Complete: 22%

Cancel

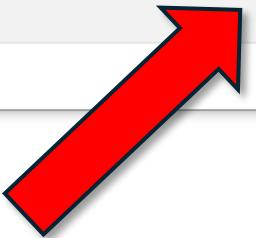


Waiting

# Completed

Mass Mailer completed successfully: 9 of 9 transactions were generated and delivered to signers.

OK



Waiting

[Create New Transaction](#)

Show 10 ▾ entries

Search name: 

<input type="checkbox"/>	Last Updated	Mailing Name	Status
<input type="checkbox"/>	1 minute ago	Annual Insurance Request 2024	0 of 9 complete
<input type="checkbox"/>	4 days ago	Recall Notice Skyward 2024-09-27 Test	Completed
<input type="checkbox"/>	4 days ago	Annual Insurance Request Test Run 5	Completed
<input type="checkbox"/>	4 days ago	Annual Insurance Request Test Run 3	Completed
<input type="checkbox"/>	4 days ago	Annual Insurance Request Test Run 2	Suspended/Cancelled
<input type="checkbox"/>	5 days ago	Zoom Annual Insurance Update - Test 1	Completed

Showing 1 to 6 of 6 entries

Previous 1 Next

Show 10 ▾ entries

- [Last Updated](#)
- [1 minute ago](#)
- [4 days ago](#)
- [4 days ago](#)
- [4 days ago](#)
- [4 days ago](#)
- [5 days ago](#)

Showing 1 to 6 of 6 entries

## Mass Mailer Summary

**Name :** Annual Insurance Request 2024**Status :** 0 of 9 complete**Submitter :** !!Demo!!KMatthews6490**CSV :** Annual-Insurance-Request-2024.csv[Download](#)

### Individual Transactions

Search: 

Transaction Name	Date Created	Status
Annual_Ins_Req_1_Max_Fun	2024-10-01 10:19:42.0	0 of 1
Annual_Ins_Req_2_Sam_Smith	2024-10-01 10:19:44.0	0 of 1
Annual_Ins_Req_3_Lucy_Jones	2024-10-01 10:19:46.0	0 of 1
Annual_Ins_Req_4_Jake_Brown	2024-10-01 10:19:48.0	0 of 1
Annual_Ins_Req_5_Emma_Green	2024-10-01 10:19:50.0	0 of 1
Annual_Ins_Req_6_Liam_Taylor	2024-10-01 10:19:52.0	0 of 1
Annual_Ins_Req_7_Ava_Wilson	2024-10-01 10:19:54.0	0 of 1
Annual_Ins_Req_8_Noah_Moore	2024-10-01 10:19:56.0	0 of 1
Annual_Ins_Req_9_Ethan_Hall	2024-10-01 10:19:57.0	0 of 1

Previous **1** Next[Close](#) [Report](#)Search name: [Create New Transaction](#)Previous **1** Next



Compose

- 1–9 of 9 < >
- MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_8\_Noah\_Moore - Your Documents Are Ready! Dear Noah Moore, Hello Your Documents are ready and this comes from the CP fr... 10:20 AM
  - MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_7\_Ava\_Wilson - Your Documents Are Ready! Dear Ava Wilson, Hello Your Documents are ready and this comes from the CP from... 10:20 AM
  - MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_5\_Emma\_Green - Your Documents Are Ready! Dear Emma Green, Hello Your Documents are ready and this comes from the CP f... 10:20 AM
  - MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_9\_Ethan\_Hall - Your Documents Are Ready! Dear Ethan Hall, Hello Your Documents are ready and this comes from the CP from t... 10:20 AM
  - MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_6\_Liam\_Taylor - Your Documents Are Ready! Dear Liam Taylor, Hello Your Documents are ready and this comes from the CP fro... 10:20 AM
  - MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_3\_Lucy\_Jones - Your Documents Are Ready! Dear Lucy Jones, Hello Your Documents are ready and this comes from the CP fro... 10:19 AM
  - MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_1\_Max\_Fun - Your Documents Are Ready! Dear Max Fun, Hello Your Documents are ready and this comes from the CP from the ... 10:19 AM
  - MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_4\_Jake\_Brown - Your Documents Are Ready! Dear Jake Brown, Hello Your Documents are ready and this comes from the CP fro... 10:19 AM
  - MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_2\_Sam\_Smith - Your Documents Are Ready! Dear Sam Smith, Hello Your Documents are ready and this comes from the CP from... 10:19 AM

## Inbox

9

Starred

Snoozed

Sent

Drafts

More

Labels

+

- MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_1\_Max\_Fun - Your Documents Are Ready! Dear Max Fun, Hello Your Documents are ready and this comes from the CP from the ... 10:19 AM
- MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_4\_Jake\_Brown - Your Documents Are Ready! Dear Jake Brown, Hello Your Documents are ready and this comes from the CP fro... 10:19 AM
- MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_2\_Sam\_Smith - Your Documents Are Ready! Dear Sam Smith, Hello Your Documents are ready and this comes from the CP from... 10:19 AM

0 GB of 15 GB used



Terms · Privacy · Program Policies

Last account activity: 4 days ago

Details

Date: 9/19/2024

To: Jake Brown

400 Brave Blvd

Austin TX 78701



FOR OFFICIAL USE ONLY  
Not for distribution or transaction

### Annual Request for Updated Insurance Details

As part of our annual compliance and safety procedures, we kindly request that you provide updated insurance details for the Jet Pack(s) you have currently leased.

Please provide the following information:

Name of Insurance Company: Flyco Insurance, Inc.

Policy Number: ACA-2446-204582

Insurance Company Phone: 555-847-5600

Equipment Coverage Limit: 120,000



Compose

G :

1-10 of 10



## Inbox

6

Starred

Snoozed

Sent

Drafts

More

Labels

+

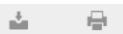
- |                          |                      |   |          |
|--------------------------|----------------------|---|----------|
| <input type="checkbox"/> | MyDox Client Online. | <b>Thank you for submitting your E-Signature!</b> - Thank You For Signing! Dear Sam Smith, Thank you for submitting your electronic signature. This confirms that you completed the following ... | 10:39 AM |
| <input type="checkbox"/> | MyDox Client Online. | You Have Documents Ready to Review: Annual_Ins_Req_8_Noah_Moore - Your Documents Are Ready! Dear Noah Moore, Hello Your Documents are ready and this comes from the CP fr...                      | 10:20 AM |
| <input type="checkbox"/> | MyDox Client Online. | You Have Documents Ready to Review: Annual_Ins_Req_7_Ava_Wilson - Your Documents Are Ready! Dear Ava Wilson, Hello Your Documents are ready and this comes from the CP from the C...              | 10:20 AM |
| <input type="checkbox"/> | MyDox Client Online. | You Have Documents Ready to Review: Annual_Ins_Req_5_Emma_Green - Your Documents Are Ready! Dear Emma Green, Hello Your Documents are ready and this comes from the CP f...                       | 10:20 AM |
| <input type="checkbox"/> | MyDox Client Online. | You Have Documents Ready to Review: Annual_Ins_Req_9_Ethan_Hall - Your Documents Are Ready! Dear Ethan Hall, Hello Your Documents are ready and this comes from the CP from t...                  | 10:20 AM |
| <input type="checkbox"/> | MyDox Client Online. | You Have Documents Ready to Review: Annual_Ins_Req_6_Liam_Taylor - Your Documents Are Ready! Dear Liam Taylor, Hello Your Documents are ready and this comes from the CP fro...                   | 10:20 AM |
| <input type="checkbox"/> | MyDox Client Online. | You Have Documents Ready to Review: Annual_Ins_Req_3_Lucy_Jones - Your Documents Are Ready! Dear Lucy Jones, Hello Your Documents are ready and this comes from the CP fro...                     | 10:19 AM |
| <input type="checkbox"/> | MyDox Client Online. | You Have Documents Ready to Review: Annual_Ins_Req_1_Max_Fun - Your Documents Are Ready! Dear Max Fun, Hello Your Documents are ready and this comes from the CP ar...                            | 10:19 AM |
| <input type="checkbox"/> | MyDox Client Online. | You Have Documents Ready to Review: Annual_Ins_Req_4_Jake_Brown - Your Documents Are Ready! Dear Jake Brown, Hello Your Documents are ready and this comes from the CP from the...                | 10:19 AM |
| <input type="checkbox"/> | MyDox Client Online. | You Have Documents Ready to Review: Annual_Ins_Req_2_Sam_Smith - Your Documents Are Ready! Dear Sam Smith, Hello Your Documents are ready and this comes from the CP from the C...                | 10:19 AM |

0 GB of 15 GB used

Terms · Privacy · Program Policies

Last account activity: 4 days ago

Details

[Create New Transaction](#)

Show 10 ▾ entries

Search name: 

<input type="checkbox"/>	Last Updated	Mailing Name	Status
<input type="checkbox"/>	20 minutes ago	Annual Insurance Request 2024	4 of 9 complete
<input type="checkbox"/>	4 days ago	Recall Notice Skyward 2024-09-27 Test	Completed
<input type="checkbox"/>	4 days ago	Annual Insurance Request Test Run 5	Completed
<input type="checkbox"/>	4 days ago	Annual Insurance Request Test Run 3	Completed
<input type="checkbox"/>	4 days ago	Annual Insurance Request Test Run 2	Suspended/Cancelled
<input type="checkbox"/>	5 days ago	Zoom Annual Insurance Update - Test 1	Completed

Showing 1 to 6 of 6 entries

Previous **1** Next

Show 10 ▾ entries

 Last Updated 20 minutes ago 4 days ago 4 days ago 4 days ago 4 days ago 5 days ago

Showing 1 to 6 of 6 entries

[Create New Transaction](#)Search name: 

## Mass Mailer Summary

**Name :** Annual Insurance Request 2024**Status :** 4 of 9 complete**Submitter :** !!Demo!!KMatthews6490**CSV :** Annual-Insurance-Request-2024.csv[Download](#)

### Individual Transactions

Search: 

Transaction Name	Date Created	Status
Annual_Ins_Req_1_Max_Fun	2024-10-01 10:19:42.0	Complete
Annual_Ins_Req_2_Sam_Smith	2024-10-01 10:19:44.0	Complete
Annual_Ins_Req_3_Lucy_Jones	2024-10-01 10:19:46.0	0 of 1
Annual_Ins_Req_4_Jake_Brown	2024-10-01 10:19:48.0	Complete
Annual_Ins_Req_5_Emma_Green	2024-10-01 10:19:50.0	0 of 1
Annual_Ins_Req_6_Liam_Taylor	2024-10-01 10:19:52.0	0 of 1
Annual_Ins_Req_7_Ava_Wilson	2024-10-01 10:19:54.0	Complete
Annual_Ins_Req_8_Noah_Moore	2024-10-01 10:19:56.0	0 of 1
Annual_Ins_Req_9_Ethan_Hall	2024-10-01 10:19:57.0	0 of 1

Previous **1** Next[Close](#) [Report](#)

Show 10 ▾ entries

 **Last Updated** 20 minutes ago 4 days ago 4 days ago 4 days ago

## Mass Mailer Report

**Name :** Annual Insurance Request 2024**All transactions or only completed:**  All transactions  Only completed transactions**Files included :**  The signed docs  Audit log  Certificate of completion  CSV file with entered form data**Close****Report**

<input type="checkbox"/>	Annual Insurance Request Test Run 3	Completed
<input type="checkbox"/>	Annual Insurance Request Test Run 2	Suspended/Cancelled
<input type="checkbox"/>	Zoom Annual Insurance Update - Test 1	Completed

Showing 1 to 6 of 6 entries

Previous **1** Next

The screenshot shows the Microsoft Excel ribbon with the 'Home' tab selected. The ribbon includes sections for剪切 (Cut), 复制 (Copy), 粘贴 (Paste), 格式刷 (Format Painter), 样式 (Styles), 单元格 (Cells), 编辑 (Editing), 检查 (Check Cell), 附加功能 (Add-ins), and 分析 (Analyze Data). The 'Styles' section contains tabs for Normal, Bad, Good, Neutral, Calculation, and Check Cell. The 'Cells' section includes Insert, Delete, Format, Fill, Sort & Filter, Find & Select, Clear, and AutoSum.



# Walkthrough – Document Distribution

SIGNiX

webtest.signix.biz/uxr3/wizard/index.jsp

Save Save As Home

Order

Add New Signer CC List Address

Move Down Move Up

Next

TERMS OF SERVICE VS12 - PRIVACY POLICY

## Mass Mailer

This feature allows you to send a document or multiple documents for review and signature to any number of recipients using a single template. All you'll need is a .CSV file formatted per SIGNiX requirements, linked [here](#).

A single placeholder signer will be added to your transaction and you'll be prompted to upload the .CSV file. Then, add a document (or documents) to the transaction on the Documents tab and finally add at least one signature or Agree/Acknowledge task to each document on the Signatures tab.

When you're ready, go to the Send tab and hit the Send All button. At any point, you can return to the Signers tab to see the list of recipients.

Cancel Start



SIGNiX

webtest.signix.biz/uxr3/wizard/index.jsp

Save Save As Home

Order

Add New Signer CC List Address

Move Down Move Up

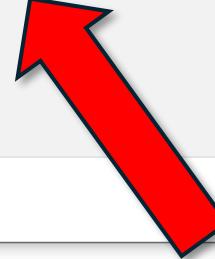
Next

Upload Recipient List

Upload a .CSV file, formatted to SIGNiX requirements, and click OK.

Choose File No file chosen

OK



SIGNiX

webtest.signix.biz/ui/uxr3/wizard/index.jsp

# SIGNiX

Signers Documents Signatures Send Status

MassMailer - 2024-09-27 - !!Demo!!KMatthews6490 1 Mass Mailer Recipients

Transaction Name	First Name	Last Name	Email	Authentication
Annual_Ins_Req_1_Max_Fun	Max	Fun	signixkarl@gmail.com	SelectOneClick

Replace CSV Download CSV

Next



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TERMS OF SERVICE WS12 - PRIVACY POLICY

SIGNiX

webtest.signix.biz/ui/uxr3/wizard/index.jsp

Save 4 Save As Home

# SIGNiX

Signers Documents Signatures Send Status

Upload Documents Click the button or drag and drop files from your computer here

Order	Document Name
Please add a document	

Move Down Move Up

Open

Organize New folder

© 2023, SIGNiX

File name: Zoom Jet Packs Recall Notice 2024-09-27

Adobe Acrobat Document

Open Cancel

Next

TERMS OF SERVICE WS12 - PRIVACY POLICY

Name	Status	Date modified	Type
Zoom Jet Packs Recall Notice 2024-09-27	Green circle	9/20/2024 4:50 PM	Adobe Acrobat Document
Zoom Jet Packs Recall Notice 2024-09-20	Green circle	9/20/2024 4:57 PM	Adobe Acrobat Document
Zoom-Annual-Insurance-Update-Form 2024-09-19	Green circle	9/19/2024 9:41 AM	Adobe Acrobat Document
Zoom Safety Advisory	Green circle	7/29/2024 9:33 AM	Adobe Acrobat Document
Zoom Safety Advisory - Signed	Green circle	7/28/2024 5:52 PM	Adobe Acrobat Document
Zoom Safety Advisory Untagged	Green circle	7/28/2024 5:49 PM	Adobe Acrobat Document
Zoom Jet Pack Lease - Signed	Green circle	7/28/2024 5:07 PM	Adobe Acrobat Document

A large red arrow points to the "Status" column header in the file selection dialog's table.

SIGNiX

webtest.signix.biz/ui/uxr3/wizard/index.jsp

Save As 4 K

# SIGNiX

Signers Documents Signatures Send Status

Signature Placeholder1 Document Fields

Zoom Jet Packs Recall Notice 2024-09-27

Initial

Text

Checkbox

Type Text

Read

Ack/Agree

+

Zoom

?

Save

Home

Signers Placeholder1

Follow the instructions provided to complete a return or drop off.

- Our customer service team is available to assist you with any questions or concerns at 555-847-5210.

We apologize for any inconvenience this may cause and appreciate your understanding and cooperation. Your safety is paramount, and we are committed to resolving this issue swiftly.

Thank you for your attention to this matter.

Sincerely,

**Zoom Jet Packs Customer Support Team**



End Document

SIGNiX

documents Zoom Jet Packs Reca

Signature

JH Initial

T Text

Checkbox

Ab Type Text

Read

Ack/Agree

webtest.signix.biz/ui/uxr3/wizard/index.jsp

Save Save As Home

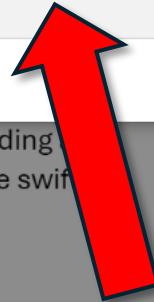
Acknowledge Agree

We apologize for any inconvenience this may cause and appreciate your understanding cooperation. Your safety is paramount, and we are committed to resolving this issue swiftly.

Thank you for your attention to this matter.

Sincerely,

**Zoom Jet Packs Customer Support Team**



SIGNIX

webtest.signix.biz/ui/uxr3/wizard/index.jsp

?

Save

Save As

Home

# SIGNIX

Signers Documents Signatures Send Status

Demonstration Mode?  
 Yes  No

Email Message

Your documents are available online for viewing and signing.

Reminders/Expiration Schedule  
Drag the slider to choose when documents expire and reminders are sent to all signers. You can choose to send no reminders.

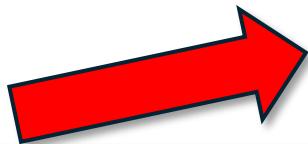
The documents will expire after 10 day(s), and signer(s) will receive reminders on day(s) 3 and 7

I do not want to send reminders to signer(s)

Clicking Send All will start the MassMailer process and send notifications to the 1 recipients shown on the Signers tab. Be sure to double check all of your information prior to starting the MassMailer.

Previous

Send All



SIGNiX

webtest.signix.biz/ui/uxr3/wizard/index.jsp

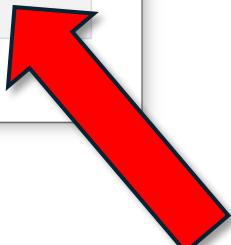
Save Save As Home

Completed

Mass Mailer completed successfully: 1 of 1 transactions were generated and delivered to signers.

OK

Waiting



SIGNIX

webtest.signix.biz/ui/uxr3/documentDashboard/index.jsp?s=signix&c=mydox&u=%21%21Demo%21%21KMatthews6490&w=SDD&nosso=true

Logout

# SIGNIX

MyDox Client - Workgroup SDD

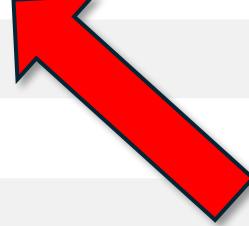
Dashboard | Transactions | Templates | Mass Mailer | ENotary Profile

Create New Transaction

Show 10 entries Search name:

Last Updated	Mailing Name	Status
moments ago	Recall Notice Skyward 2024-09-27 Test	0 of 1 complete
4 hours ago	Annual Insurance Request Test Run 5	Completed
6 hours ago	Annual Insurance Request Test Run 3	Completed
6 hours ago	Annual Insurance Request Test Run 2	Suspended/Cancelled
1 day ago	Zoom Annual Insurance Update - Test 1	Completed

Showing 1 to 5 of 5 entries Previous 1 Next



SIGNiX

MyDox Client - Workgroup SDD

Show 10 entries

Last Updated

moments ago

4 hours ago

6 hours ago

6 hours ago

1 day ago

Showing 1 to 5 of 5 entries

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webtest.signix.biz/ui/uxr3/documentDashboard/index.jsp?s=signix&c=mydox&u=%21%21Demo%21%21KMatthews6490&w=SDD&nosso=true

## Mass Mailer Summary

**Name :** Recall Notice Skyward 2024-09-27 Test

**Status :** 0 of 1 complete

**Submitter :** !!Demo!!KMatthews6490

**CSV :** Annual-Recall-Notice-test1-2024.csv [Download](#)

### Individual Transactions

Transaction Name	Date Created	Status
Annual_Ins_Req_1_Max_Fun	2024-09-27 16:48:40.0	0 of 1

Search: |

Previous 1 Next

[Close](#) [Report](#)

Logout

Mass Mailer | ENotary Profile

Create New Transaction

ne:

Previous 1 Next

TERMS OF SERVICE VS12 - PRIVACY POLICY

Inbox (1) - signixkarl@gmail.com +

mail.google.com/mail/u/0/?tab=rm&ogbl#inbox

Gmail

Compose

Inbox 1

Starred

Snoozed

Sent

Drafts

More

Labels +

Search mail

MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_1\_Max\_Fun - Your Documents Are Ready! Dear Max Fun, Hello Your ... 4:48 PM

1-1 of 1 < >

Red arrow pointing to the subject line "MyDox Client Online. You Have Documents Ready to Review: Annual\_Ins\_Req\_1\_Max\_Fun - Your Documents Are Ready! Dear Max Fun, Hello Your ... 4:48 PM"

0 GB of 15 GB used

Terms · Privacy · Program Policies

Last account activity: 1 hour ago

Details

You Have Documents Ready to 

mail.google.com/mail/u/0/?tab=rm&ogbl#inbox/

Gmail Search mail 

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Labels +

Your Documents Are Ready!

Dear Max Fun,

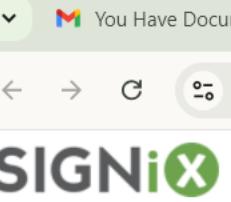
Hello Your Documents are ready and this comes from the CP from the CP area, not the SubmitDocument!!!!!! at Client level

Please click on the link below to start signing:

These are your documents:  
0002-Max Fun-Zoom Jet Packs Recall Notice 2024-09-27

Please click on this link:

Sign Documents 



You Have Documents Ready to [x](#) SIGNiX [x](#) +

← → ⌂ [webtest.signix.biz/ui/uxr3/signing/index.jsp](https://webtest.signix.biz/ui/uxr3/signing/index.jsp) ☆ 4 | 🐾 ⋮

**SIGNiX** ? Logout

## Welcome Back, Max Fun!

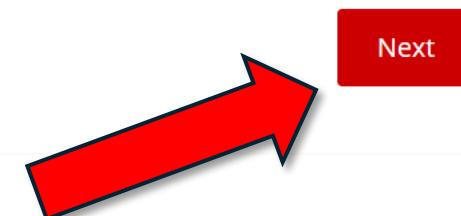
You've been asked to review and sign documents online. It's easy!

To get started, you need to agree to receive electronic documents using the electronic signature service under the terms of the E-Sign Legal Consent by choosing **Accept** below. This will confirm that you are able to access all of the documents provided to you in electronic form and you agree to be bound by the [terms of service](#).

Click **Next** to continue!

Agree to Legal Consent and Terms of Service?  **Accept**  [Decline](#)

[Read Legal Consent](#)



**Next**

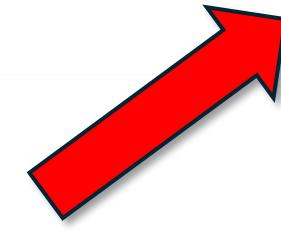
[Logout](#)

## Max, Please Log In

Please enter the password you previously created in order to log in. If you've forgotten your password, click [Forgot My Password](#).

[Forgot My Password](#)**Enter your password**

.....

 I wish to update my signature/initials [Next](#)



## Ready To Review and Sign?

Select **Go** to jump right to your first action and let us guide you through the document. If you'd rather go at your own pace, choose **Let Me Review**. Simply scroll or use the **NEXT** and **PREV** buttons at the bottom corners of the screen to jump to unfinished signatures and other tasks.

[Let Me Review](#)[Go!](#)

At Zoom Jet Packs, your safety is our top priority. We are writing to inform you of an important recall affecting our Skyward line of jet packs.

### Issue Description:

We have identified a potential safety issue with the Skyward jet packs. If pilots fly for a sustained period of time at an angle of 100 degrees from the vertical or greater, there is a risk of an interruption to the fuel supply to the rockets. This interruption could potentially cause an immediate loss of power.

### Immediate Actions Required:

- Flying Angle Limitation:** Until your Skyward jet pack is serviced, please ensure that you do not fly at angles greater than 100 degrees from the vertical. Flying beyond this angle may result in fuel supply interruption, and you will be bearing the risk of power loss.



My Progress

0002-Max Fun-Zoom Jet Packs Recall Notice 2024-09-27



Save

Logout

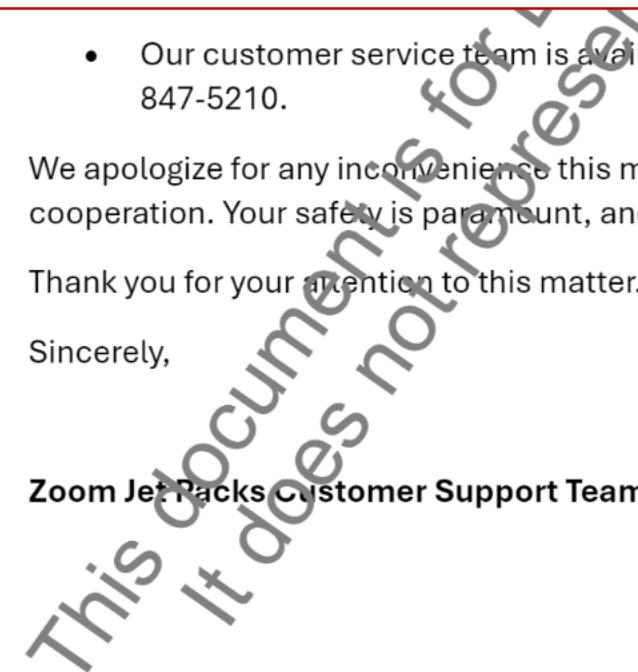
- Our customer service team is available to assist you with any questions or concerns at 555-847-5210.

We apologize for any inconvenience this may cause and appreciate your understanding and cooperation. Your safety is paramount, and we are committed to resolving this issue swiftly.

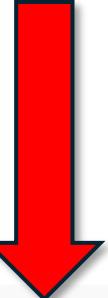
Thank you for your attention to this matter.

Sincerely,

**Zoom Jet Packs Customer Support Team**

  
End Document

You have been asked to acknowledge reading the document above. Please review the document and then click on the **Acknowledge** button

  
**Acknowledge**

## Finished Signing?

Almost done! If you're finished with this document(s), tap **Finish** below to confirm your signatures and other entries on this document(s). If you want to spend more time reviewing the document(s), select **Stay Here**. You'll see the documents again, and can click **Finish Signing** at the bottom of the screen when you're done reviewing the documents.

[Stay Here](#)[Finish](#)[End Document](#)

If you have changed your mind about acknowledging this document, please click the **Unacknowledge** button

[Unacknowledge](#)

You Have Documents Ready to [X](#) SIGNiX [X](#) +

← → ⌂ webtest.signix.biz/ui/uxr3/signing/index.jsp [Star](#) [4](#) [Open in new window](#) [Help](#) ⋮

# SIGNiX

**Max, thanks for signing online!**

You have successfully completed all required actions.

Thank you for submitting your signature online.

Want to bring the speed & security of digital signatures to your business?

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**SIGNiX**

[Close](#) [Review](#)



A large red arrow points diagonally upwards and to the right towards the "Logout" button in the top right corner of the page.

SIGNIX

webtest.signix.biz/ui/uxr3/documentDashboard/index.jsp?s=signix&c=mydox&u=%21%21Demo%21%21KMatthews6490&w=SDD&nosso=true

Logout

# SIGNIX

MyDox Client - Workgroup SDD

Dashboard | Transactions | Templates | Mass Mailer | ENotary Profile

Create New Transaction

Show 10 entries Search name:

Last Updated	Mailing Name	Status
3 minutes ago	Recall Notice Skyward 2024-09-27 Test	Completed
4 hours ago	Annual Insurance Request Test Run 5	Completed
6 hours ago	Annual Insurance Request Test Run 3	Completed
7 hours ago	Annual Insurance Request Test Run 2	Suspended/Cancelled
1 day ago	Zoom Annual Insurance Update - Test 1	Completed

Showing 1 to 5 of 5 entries Previous 1 Next



SIGNiX

MyDox Client - Workgroup SDD

Show 10 entries

- Last Updated
- 3 minutes ago
- 4 hours ago
- 6 hours ago
- 7 hours ago
- 1 day ago

Showing 1 to 5 of 5 entries

Mass Mailer Summary

Name : Recall Notice Skyward 2024-09-27 Test

Status : Completed

Submitter : !!Demo!!KMatthews6490

CSV : Annual-Recall-Notice-test1-2024.csv [Download](#)

Individual Transactions

Transaction Name	Date Created	Status
Annual_Ins_Req_1_Max_Fun	2024-09-27 16:48:40.0	Complete

Search:

Close Report

Logout

Create New Transaction

ne:

Previous 1 Next

Previous 1 Next

TERMS OF SERVICE VS12 - PRIVACY POLICY

# MassMailer Document Distribution- Recap

- Used a document created in MS Word and exported as a PDF
- Created a CSV of data, containing:
  - List of recipients
- Created a MassMailer transaction
  - Uploaded CSV
  - Tagged the document with “acknowledgement” tag
  - Submitted the transactions to signers
- Distributed documents via email link
- Tracked viewing / acknowledgements