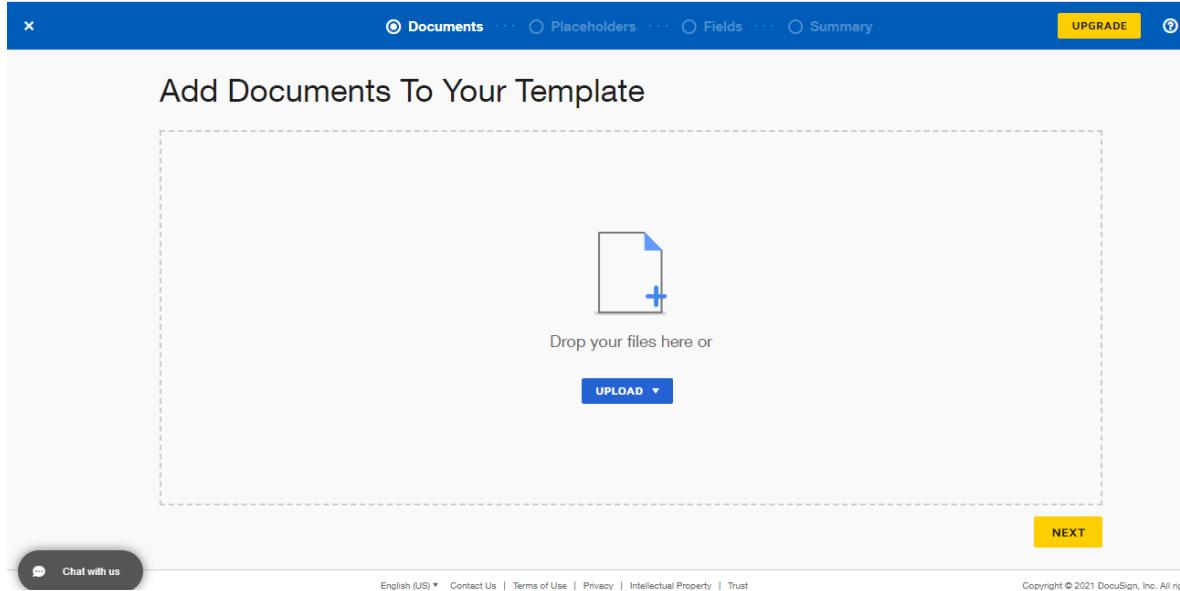
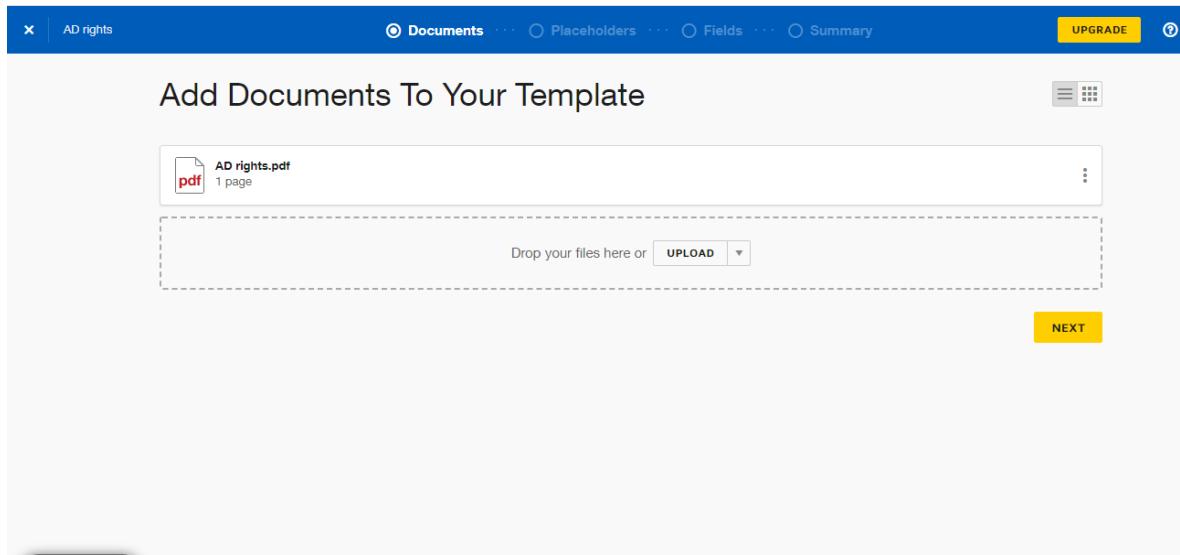


## Docusign Format ( Template for sending )



1. The first step is to upload a pdf document.



2. Once upload you can name the document

The screenshot shows the 'Create Placeholder Recipients' step in the DocuSign interface. A placeholder named 'Placeholder 1 (e.g. Client, Buyer, HR)' is selected. The 'NEEDS TO SIGN' section is active, showing 'Needs to Sign' and 'CC Receives a Copy' options. The 'CUSTOMIZE' section is also visible. Navigation buttons 'BACK' and 'NEXT' are at the bottom.

3. Now that the document is named and uploaded we need to set up the placeholders ( senders and receivers )
  - A. Need to sign - means that this placeholder is required to sign the document.
  - B. Receives a cop - means that this placeholder doesn't have to sign but gets a copy of the final signed document.

The screenshot shows the 'Create Placeholder Recipients' step again. The placeholder 'Placeholder 1 (e.g. Client, Buyer, HR)' now has a grey border. The 'CC RECEIVES A COPY' section is active, showing options to 'Add name and email', 'Add access code' (with a note 'Enter a code that only you and this recipient know.'), 'Delete Recipient', and 'Advanced settings'. The 'NEXT' button is highlighted in yellow.

4. We next set up the name and email for the placeholders.
  - A. You can add a access code if you like
  - B. Delete the placeholder
  - C. Advance settings

AD rights

Documents — Placeholders Fields Summary UPGRADE ?

## Create Placeholder Recipients

Set signing order | View

Placeholder 1 (e.g. Client, Buyer, HR) CC RECEIVES A COPY CUSTOMIZE

Advanced Settings  
Recipient Modification  
 Don't allow senders to edit recipient  
 Don't allow senders to delete recipient

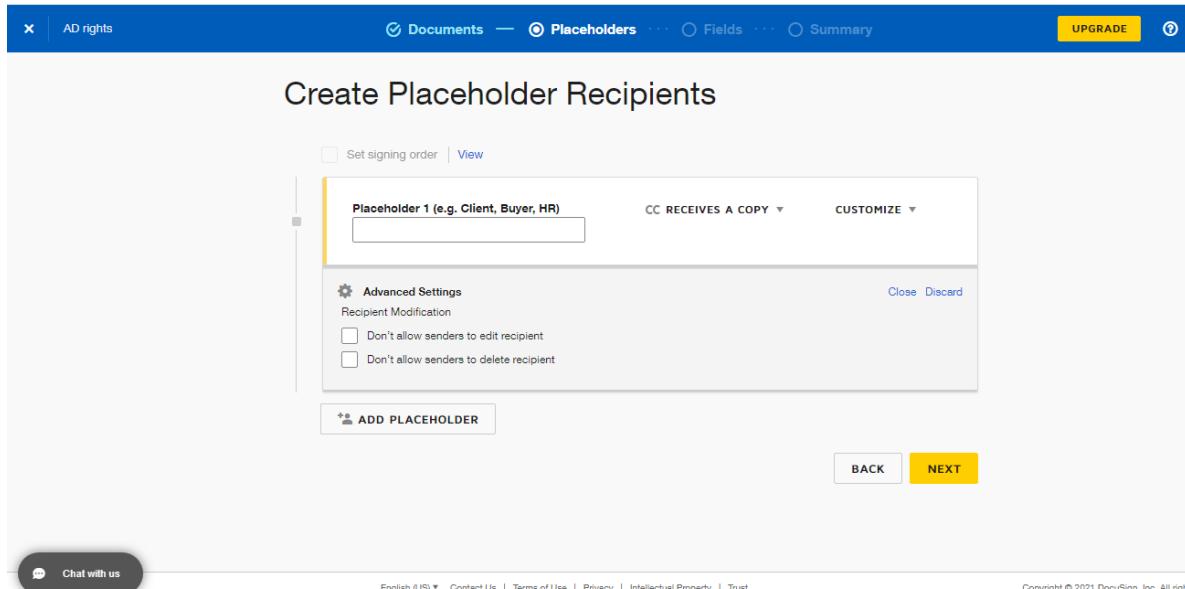
[Close](#) [Discard](#)

[ADD PLACEHOLDER](#)

[BACK](#) [NEXT](#)

Chat with us

English (US) Contact Us Terms of Use Privacy Intellectual Property Trust Copyright © 2021 DocuSign, Inc. All rights reserved.



AD rights

Documents — Placeholders Fields Summary UPGRADE ?

## Create Placeholder Recipients

Set signing order | View

Placeholder 1 (e.g. Client, Buyer, HR) NEEDS TO SIGN CUSTOMIZE

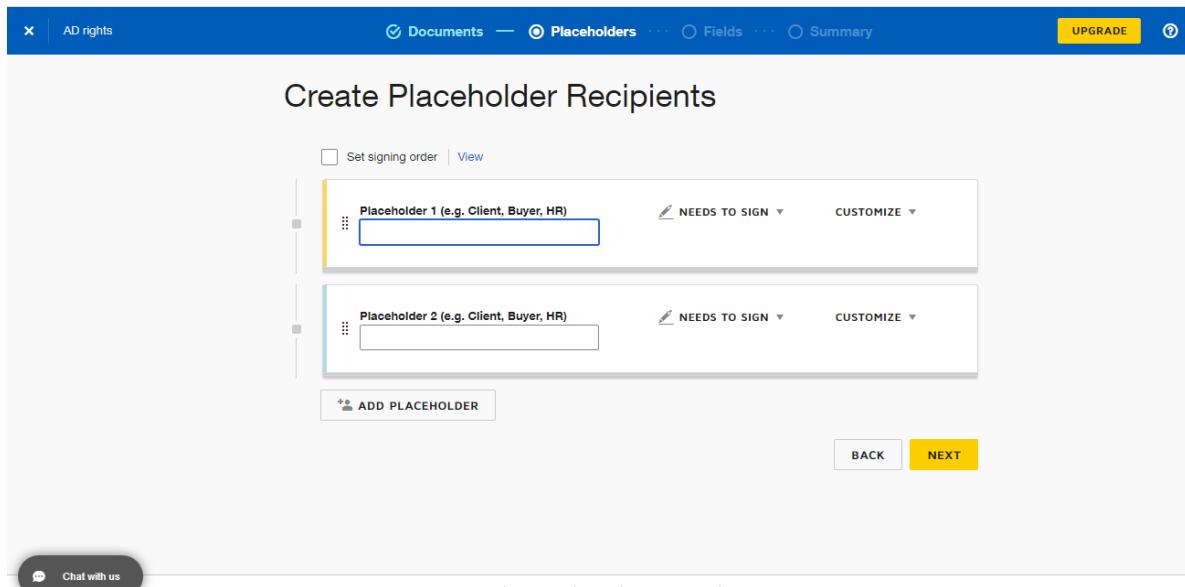
Placeholder 2 (e.g. Client, Buyer, HR) NEEDS TO SIGN CUSTOMIZE

[ADD PLACEHOLDER](#)

[BACK](#) [NEXT](#)

Chat with us

English (US) Contact Us Terms of Use Privacy Intellectual Property Trust Copyright © 2021 DocuSign, Inc. All rights reserved.



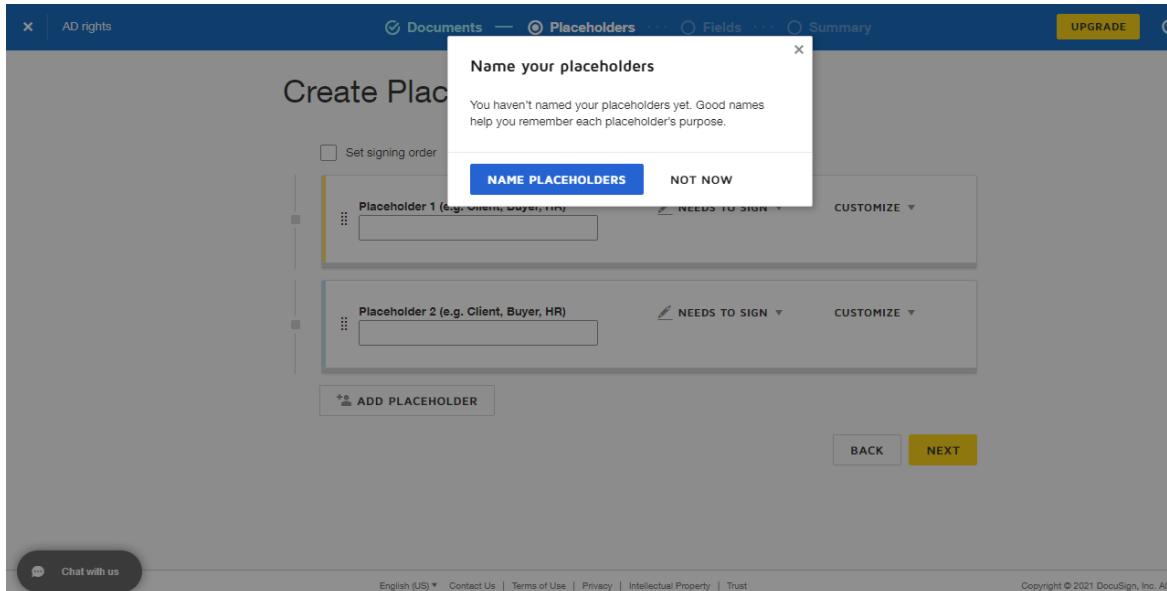
5. Next we add another placeholder ( Receiver )

The screenshot shows a digital interface for managing signatory placeholders. At the top left is a checkbox for 'Set signing order' and a 'View' link. Below this are four placeholder entries, each consisting of a text input field, a 'NEEDS TO SIGN' button with a dropdown arrow, and a 'CUSTOMIZE' button with a dropdown arrow. The placeholders are color-coded: Placeholder 1 (yellow), Placeholder 2 (light blue), Placeholder 3 (purple), and Placeholder 4 (green). A horizontal dashed line separates these from a 'ADD PLACEHOLDER' button at the bottom. At the very bottom are 'BACK' and 'NEXT' buttons.

You can add multiple if you need to.

This screenshot is similar to the previous one but shows Placeholder 4 being removed. A red 'X' icon is positioned next to Placeholder 4's entry, and a 'Remove A Recipient' button is located to its right. All other elements—checkbox, 'View' link, placeholder entries, and buttons—are identical to the first screenshot.

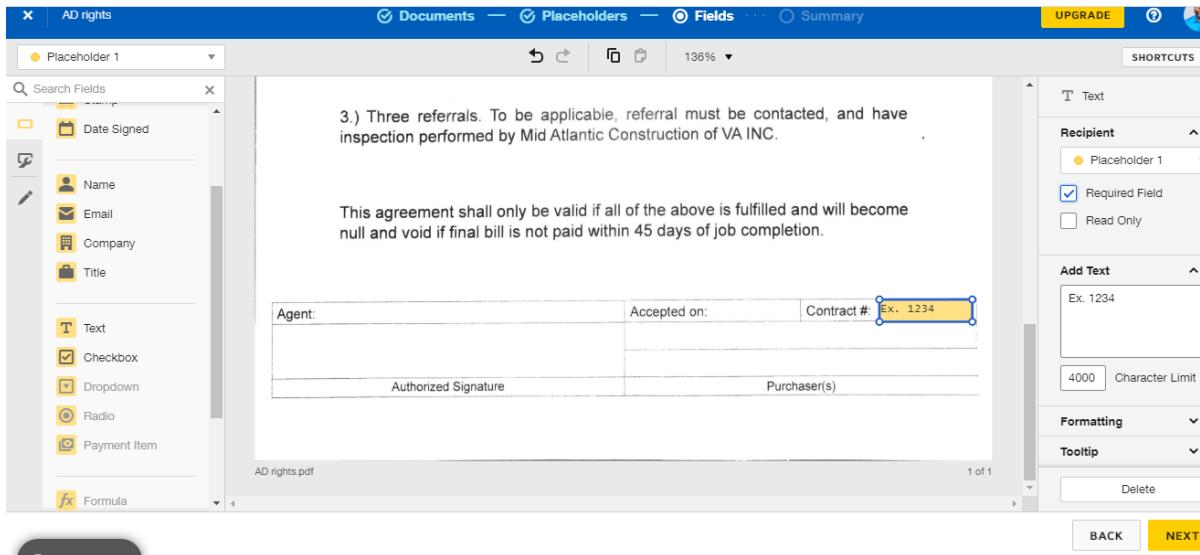
You can delete if you need to as well



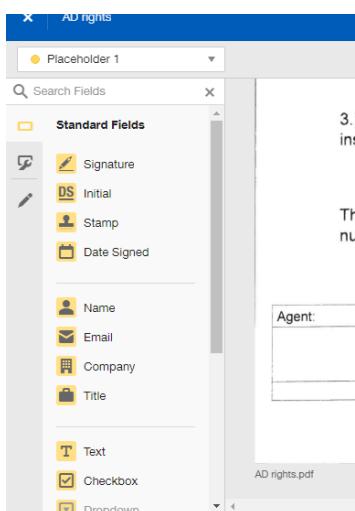
6. We now have 2 place holders set up to send and receive . Sender 1 - yellow and receiver 2 - blue  
You have the option to switch between whatever placeholder you need to place the proper fields. ( standard fields )

## Switching between placeholders.

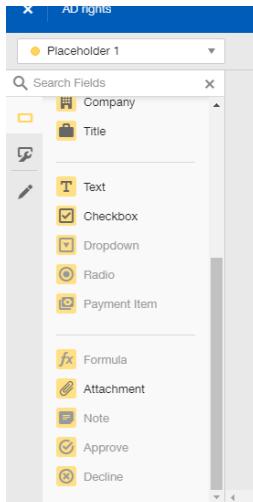
8. Adding fields according to the form and how it needs to be filled out. Name, address, email , etc. I would need the CRM fields to auto populate into the standard fields.



9. If its a required field then you check the box and the receiver has to fill in that field. On the right is more formatting options



Some of the standard fields



## More of the standard fields

A screenshot of the AD rights interface showing a document titled "AD rights.pdf". The document contains text: "3.) Three referrals. To be applicable, referral must be contacted, and have inspection performed by Mid Atlantic Construction of VA INC." and "This agreement shall only be valid if all of the above is fulfilled and will become null and void if final bill is not paid within 45 days of job completion." Below the text is a table with columns "Agent:", "Accepted on:", and "Contract #". The "Contract #" column contains the value "Ex. 1234". A "Sign" button is located in the "Agent:" column. To the right of the table is a sidebar with sections for "Recipient" (Placeholder 1, Required Field checked), "Formatting", "Tooltip", "Location", and "Sender Permissions". At the bottom are "BACK" and "NEXT" buttons.

10. Add the place where to sign for sender

3.) Three referrals. To be applicable, referral must be contacted, and have inspection performed by Mid Atlantic Construction of VA INC.

This agreement shall only be valid if all of the above is fulfilled and will become null and void if final bill is not paid within 45 days of job completion.

Agent: Accepted on: Contract #: Ex. 1234

Sign Sign

Authorized Signature Purchaser(s)

AD rights.pdf 1 of 1

**UPGRADE** **SHORTCUTS**

**Recipient**  
Placeholder 2  
 Required Field

**Formatting**  
Tooltip  
Location  
Sender Permissions

**DELETE** **BACK** **NEXT**

## 11. Add the place for the receiver

### Review Template

**MAC**  
MID ATLANTIC CONSTRUCTION OF VA & MD

5731 Wellington Rd  
Glen Burnie, MD 21060  
Phone: 703-404-8777  
Fax: 703-404-8788  
VA Class A License #2705-078-795A  
MHIC# 128183

Date:	Home Phone:		
Name: <input type="text" value="Full Name"/>	Mobile Phone:		
Address:	Work Phone:		
City:	State:	Zip: <input type="text" value="Email"/>	E-Mail: <input type="text" value="Email"/>

### Advertising Rights

Mid-Atlantic Construction of VA INC to purchase Advertising Rights from homeowner for the amount of \$500.

Homeowner agrees to provide the following:

1.) Permission for Mid Atlantic Construction of VA INC to place a job sign in the yard of the corresponding property for the duration of the project.

**SUMMARY** **MESSAGE** **OPTIONS**

**Template Name** [Edit](#)  
Untitled 7/17/2021 | 7:35:47 AM

**Documents** [Edit](#)  
AD rights.pdf

**Recipients** [Edit](#)  
Placeholder 1  
Placeholder 2

**BACK** **SAVE TEMPLATE**

## 12. After everything is added to the document then we can add final options/features.

## Review Template

**MAC**  
MID ATLANTIC CONSTRUCTION OF VA & MD

5731 Wellington Rd  
Gainesville, VA 20158  
Phone: 703-404-9777  
Fax: 1-800-569-8188  
Toll Free: 1-800-569-8188  
VA Class A License # 128183  
NHC# 128183

Date:	Home Phone:		
Name: <b>Fu11 Name</b>	Mobile Phone:		
Address:	Work Phone:		
City:	State:	Zip:	E-Mail: <b>Ema1</b>

### Advertising Rights

Mid-Atlantic Construction of VA INC to purchase Advertising Rights from homeowner for the amount of \$500.

Homeowner agrees to provide the following:

1.) Permission for Mid Atlantic Construction of VA INC to place a job sign in the yard of the corresponding property for the duration of the project.

Chat with us

BACK

SAVE TEMPLATE

## 13. Add a message if needed

## Review Template

### Advertising Rights

Mid-Atlantic Construction of VA INC to purchase Advertising Rights from homeowner for the amount of \$500.

Homeowner agrees to provide the following:

1.) Permission for Mid Atlantic Construction of VA INC to place a job sign in the yard of the corresponding property for the duration of the project.

2.) Two Online reviews (Angie's List, Google, Facebook, Yelp, etc.)

3.) Three referrals. To be applicable, referral must be contacted, and have inspection performed by Mid Atlantic Construction of VA INC.

This agreement shall only be valid if all of the above is fulfilled and will become null and void if final bill is not paid within 45 days of job completion.

Chat with us

BACK

SAVE TEMPLATE

## 14. Add a hyper text

AD rights

Documents — Placeholders — Fields — Summary

UPGRADE

## Review Template

### Advertising Rights

Mid-Atlantic Construction of VA INC to purchase Advertising Rights from homeowner for the amount of \$500.

Homeowner agrees to provide the following:

- 1.) Permission for Mid Atlantic Construction of VA INC to place a job sign in the yard of the corresponding property for the duration of the project.
- 2.) Two Online reviews (Angie's List, Google, Facebook, Yelp, etc.)
- 3.) Three referrals. To be applicable, referral must be contacted, and have inspection performed by Mid Atlantic Construction of VA INC.

This agreement shall only be valid if all of the above is fulfilled and will become null and void if final bill is not paid within 45 days of job completion.

To All Recipients

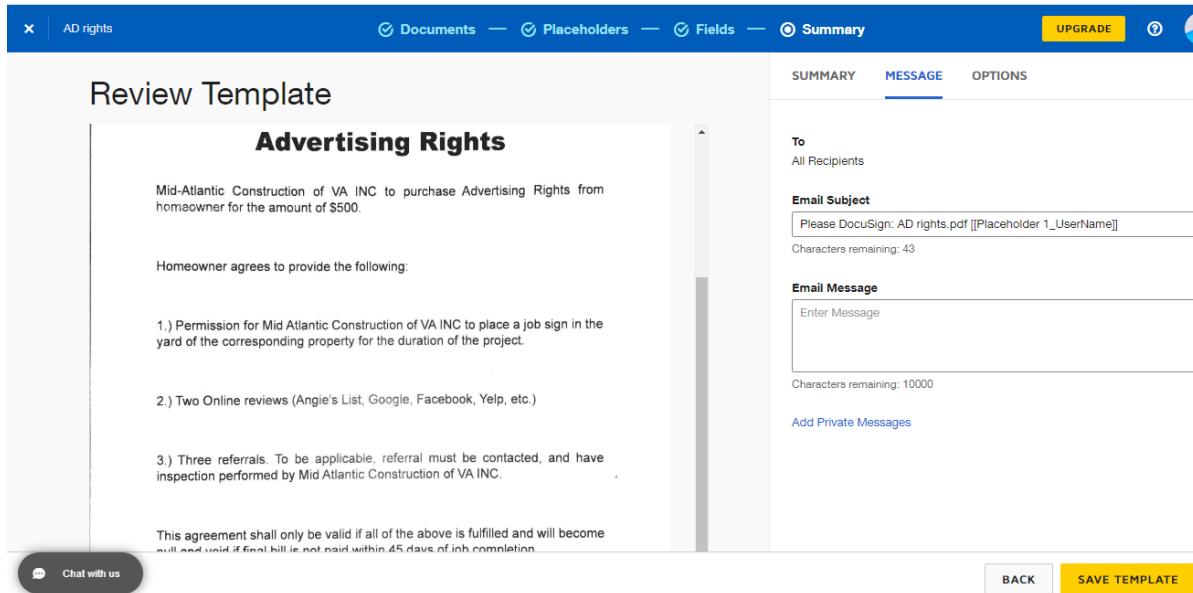
Email Subject Please DocuSign: AD rights.pdf [[Placeholder 1\_UserName]] Characters remaining: 43

Email Message Enter Message Characters remaining: 10000

Add Private Messages

Chat with us

BACK SAVE TEMPLATE



AD rights

Documents — Placeholders — Fields — Summary

UPGRADE

## Review Template

### Advertising Rights

Mid-Atlantic Construction of VA INC to purchase Advertising Rights from homeowner for the amount of \$500.

Homeowner agrees to provide the following:

- 1.) Permission for Mid Atlantic Construction of VA INC to place a job sign in the yard of the corresponding property for the duration of the project.
- 2.) Two Online reviews (Angie's List, Google, Facebook, Yelp, etc.)
- 3.) Three referrals. To be applicable, referral must be contacted, and have inspection performed by Mid Atlantic Construction of VA INC.

This agreement shall only be valid if all of the above is fulfilled and will become null and void if final bill is not paid within 45 days of job completion.

To Placeholder 1

Enter Message Characters remaining: 1000

DONE CANCEL

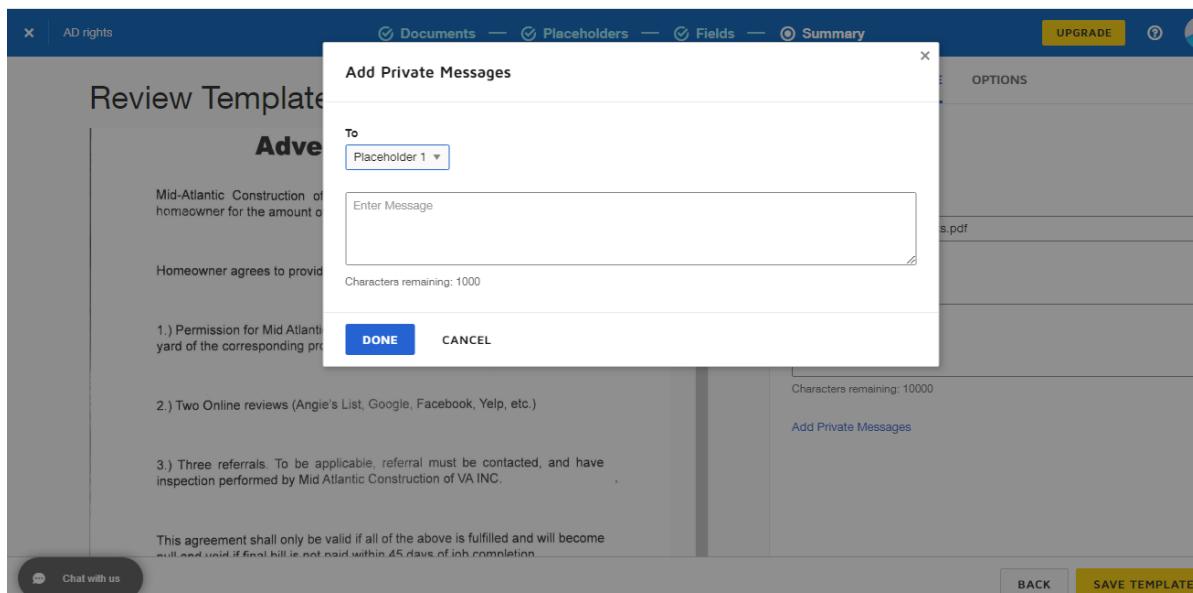
OPTIONS

s.pdf Characters remaining: 10000

Add Private Messages

Chat with us

BACK SAVE TEMPLATE



## 15. Add a private message to whomever

AD rights    DOCUMENTS    PLACEHOLDERS    FIELDS    SUMMARY    UPGRADE    ?

## Review Template



6311 Wellington Rd  
Gainesville, VA 20158  
Phone: 703-404-8777  
Fax: 703-404-8768  
VA Class A License #2703-078-795A  
MHIC# 128183

Date:	Home Phone:		
Name: <input type="text" value="Full Name"/>	Mobile Phone:		
Address:	Work Phone:		
City: <input type="text"/>	State: <input type="text"/>	Zip: <input type="text"/>	E-Mail: <input type="text" value="Email"/>

### Advertising Rights

Mid-Atlantic Construction of VA INC to purchase Advertising Rights from homeowner for the amount of \$500.

Homeowner agrees to provide the following:

1.) Permission for Mid Atlantic Construction of VA INC to place a job sign in the yard of the corresponding property for the duration of the project.

### 16. Send reminders and privileges or add a password

AD rights    DOCUMENTS    PLACEHOLDERS    FIELDS    SUMMARY    UPGRADE    ?

## Review Template



6311 Wellington Rd  
Gainesville, VA 20158  
Phone: 703-404-8777  
Fax: 703-404-8768  
VA Class A License #2703-078-795A  
MHIC# 128183

Date:	Home Phone:		
Name: <input type="text" value="Full Name"/>	Mobile Phone:		
Address:	Work Phone:		
City: <input type="text"/>	State: <input type="text"/>	Zip: <input type="text"/>	E-Mail: <input type="text" value="Email"/>

### Advertising Rights

Mid-Atlantic Construction of VA INC to purchase Advertising Rights from homeowner for the amount of \$500.

Homeowner agrees to provide the following:

1.) Permission for Mid Atlantic Construction of VA INC to place a job sign in the yard of the corresponding property for the duration of the project.

2.) Two Online reviews (Angie's List, Google, Facebook, Yelp, etc.)

3.) Three referrals. To be applicable, referral must be contacted, and have inspection performed by Mid Atlantic Construction of VA INC.

This agreement shall only be valid if all of the above is fulfilled and will become null and void if final bill is not paid within 45 days of job completion.

Agent:	Accepted on:	Contract #:
		Ex. 1234
Authorized Signature	Purchaser(s)	

AD rights.pdf 1 of 1

BACK SAVE TEMPLATE

**Expiration**  
Envelope expires  days from sending

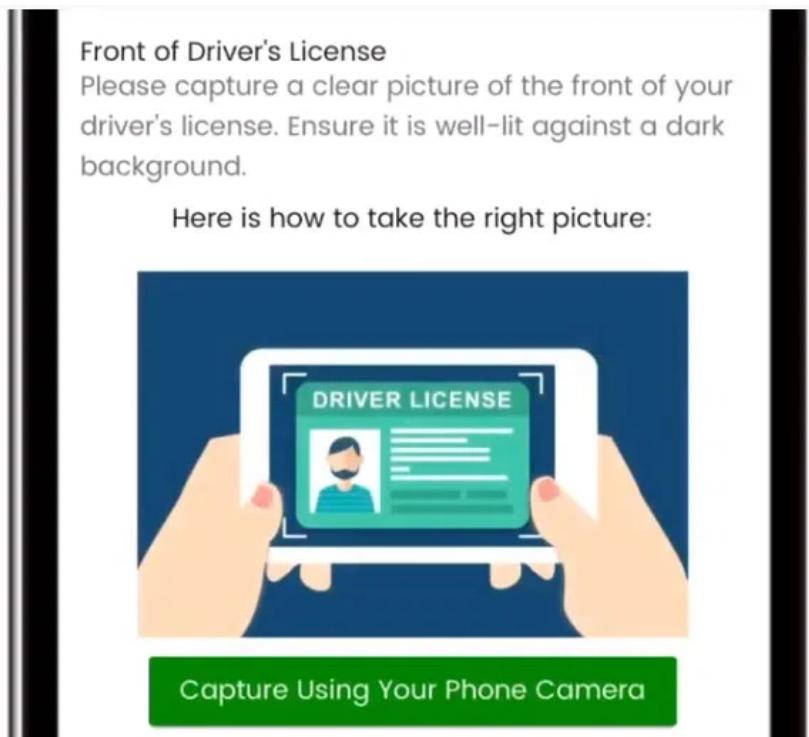
**Password**  
**Create Password**  
  
Maximum 15 characters

**Verify Password**

**Template Modification**  
 Don't allow senders to edit, add, or remove recipients.  
 Don't allow senders to edit the subject, email, or private messages.

**Comments**  
 Enable comments

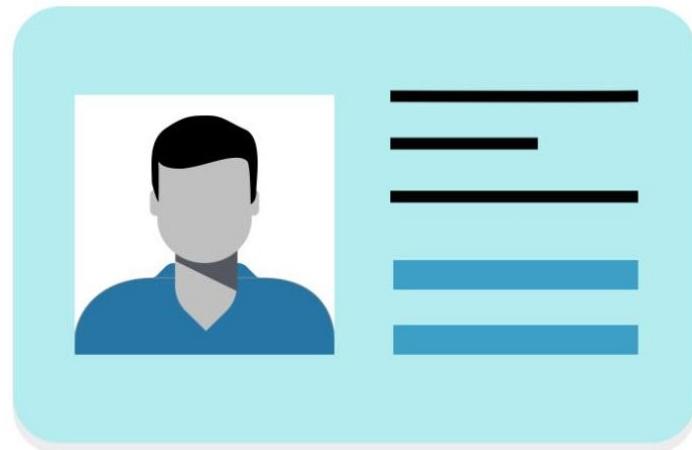
17 . If a pic of id is required then the receiver must upload or take a pic and attach it to the document.





## Take a photo of your Driver's License

Make sure your Driver's License is not expired and avoid using the flash so that your information is clear and visible.



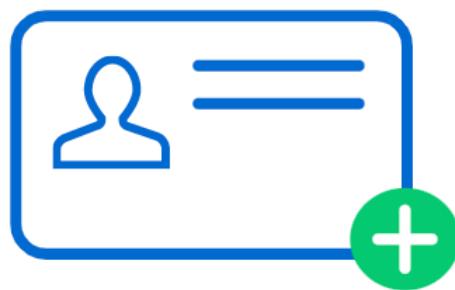
**TAP TO ADD**

## TAKE PHOTOS WITH YOUR PHONE

1

2

3



Choose photo of your driver's license or state  
ID  
(FRONT)



Choose photo of your driver's license or state  
ID  
(BACK)

The form is now saved as a template. Those ( pefex staff ) with permissions will be able to access templates to use for the future.

Need to add an option to get Identification. Lic , passport, etc.

After the document is templated the document can be sent to Placeholder #1 and then #2 via email for signature ( 2-way signing - different locations) or the Placeholder #1 signs on a device then #2 after on the same device ( one way same device - same location ). When the document is done it goes under the signee's file

When the document is sent to the receiver you get a receipt that the receiver has looked at the document and received it. Once the document is signed then I am alerted that the document is signed and completed.

Also when the contract is signed then it's saved in the selected profile ( Staff , lead , customer , etc ) and can be listed on a dashboard.

Evidence of location , time , date etc will be on a report when completed for both sender and receiver.