



How to Get Started on eSecureDocs

About eSecureDocs

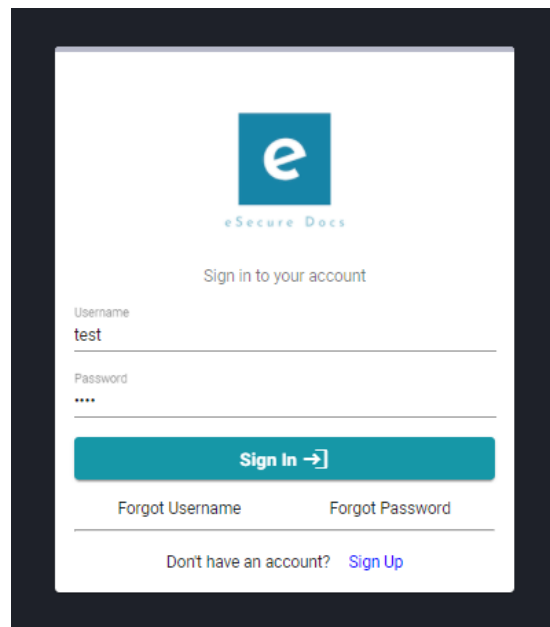
eSecureDocs is an innovative document management platform which enables its users to

- Create, Share, and Edit a Document Online
- Easily Collaborate on a Document
- Send a Document for eSignature
- Access template resources through Template Marketplace
- Manage your templates on one tool with My Templates

Work Anywhere as eSecureDocs is mobile-friendly.

Getting Started

Step 1: Log into your account [here](#).



The image shows a screenshot of the eSecureDocs login interface. At the top center is the eSecureDocs logo, which consists of a teal square with a white lowercase 'e' inside, followed by the text 'eSecure Docs' in a smaller font. Below the logo is the text 'Sign in to your account'. There are two input fields: 'Username' with the text 'test' and 'Password' with four dots. Below these fields is a teal button with the text 'Sign In →'. Underneath the button are two links: 'Forgot Username' and 'Forgot Password'. At the bottom of the form is the text 'Don't have an account?' followed by a blue link 'Sign Up'.

Step 2: Go to your Dashboard and click Marketplace

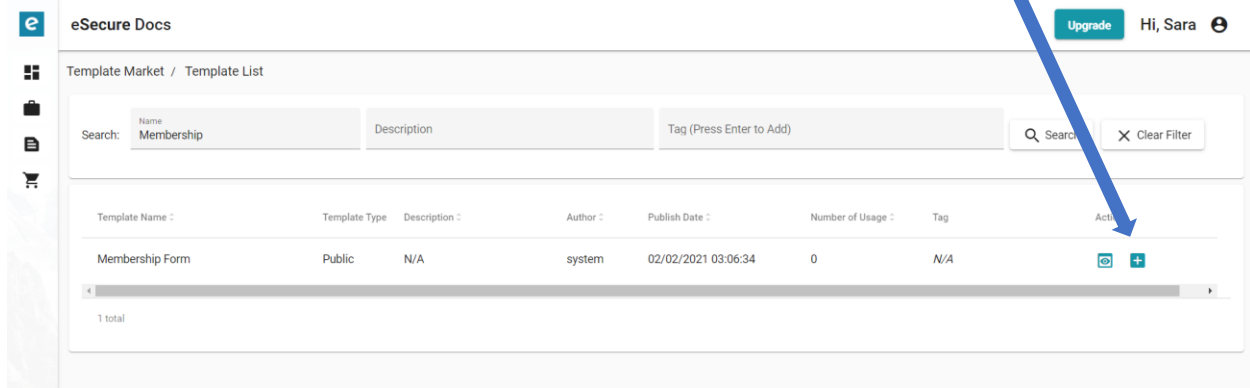
The screenshot shows the eSecure Docs dashboard. At the top left, there is a sidebar with icons for Dashboard, Documents, and Marketplace. A blue arrow points to the Marketplace icon. The main content area has a header with the eSecure Docs logo and a 'Start Creating' button. Below the header, there are two sections: 'My Recent Documents' and 'Need My Signature'. The footer contains the eSecure Docs logo, copyright information, and links for Contact Us and Disclaimer.

Step 3: On the Marketplace, search and find any Templates you want to add to your account under 'My Templates'

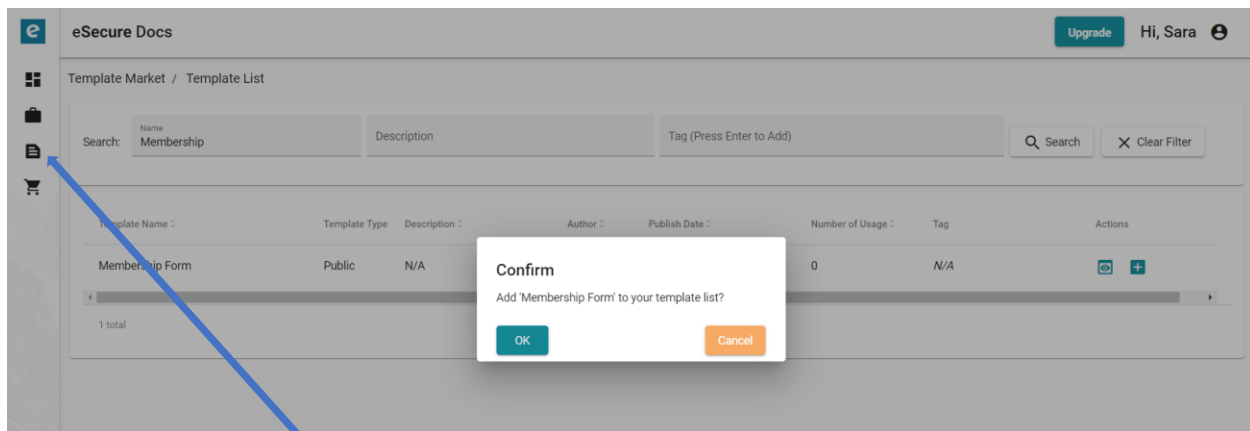
The screenshot shows the eSecure Docs Template Market. The page has a search bar with fields for Name, Description, and Tag. Below the search bar is a table of templates. The table has the following columns: Template Name, Template Type, Description, Author, Publish Date, Number of Usage, Tag, and Actions. The 'W-9 Form' template is highlighted in orange.

Template Name	Template Type	Description	Author	Publish Date	Number of Usage	Tag	Actions
W-9 Form	Public	W-9 Form from IRS	Ideng	08/11/2021 10:39:22	0	Tax	
Texas New Home Contract (Completed C	Public	N/A	system	12/09/2020 04:03:12	0	N/A	
Membership Form	Public	N/A	system	02/02/2021 03:06:34	0	N/A	
Tenant Background Authorization	Public	N/A	system	02/02/2021 03:15:40	0	N/A	
Texas Residential Lease Agreement	Public	N/A	Ideng	02/02/2021 03:23:54	1	N/A	
Check Request Template	Public	General Check Request Temp	Ideng	04/14/2021 08:51:15	0	N/A	
Check Request Form - Vendor Request	Public	N/A	MaryN	07/27/2021 04:12:21	0	N/A	
Landscaping Quote with Customer Signat	Public	N/A	MaryN	07/27/2021 04:12:58	0	N/A	

Step 4: Once you have found a template, click the + button under Actions to add the template to your account.

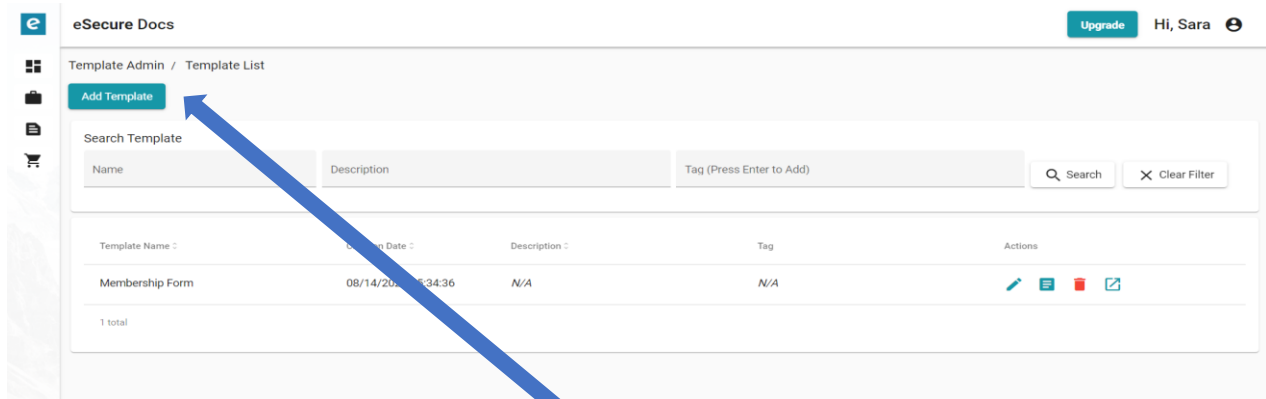


Step 5: Hit Ok to confirm adding the template to your account.



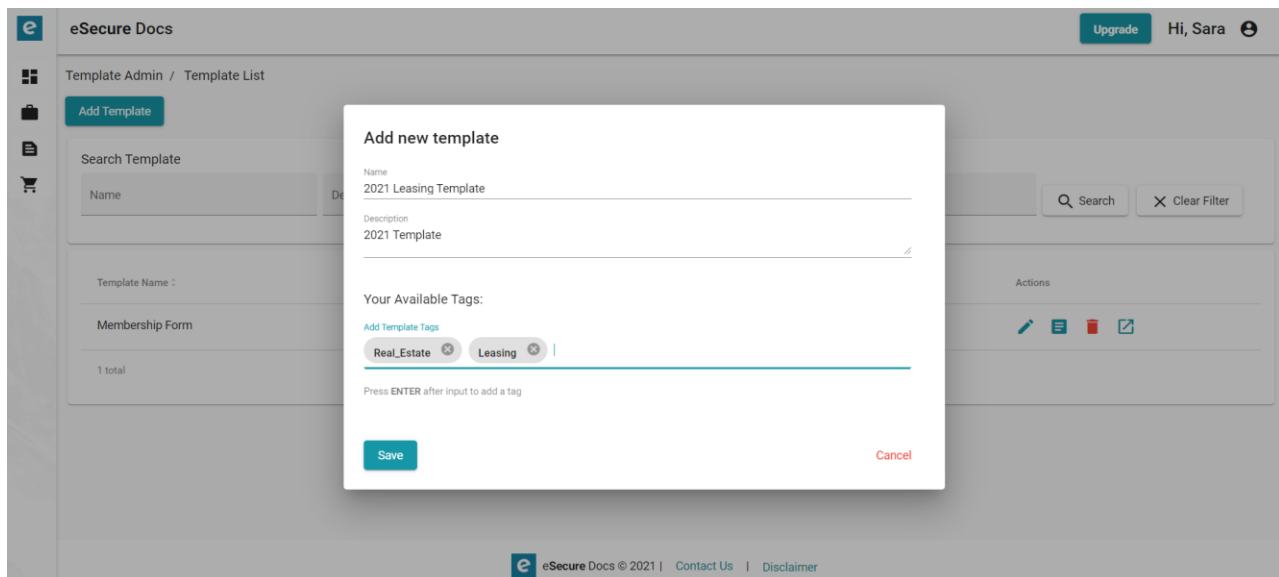
Step 6: Go to My Templates to View your Templates.

Step 7: In My Templates, your newly added Template from the Marketplace will be loaded.

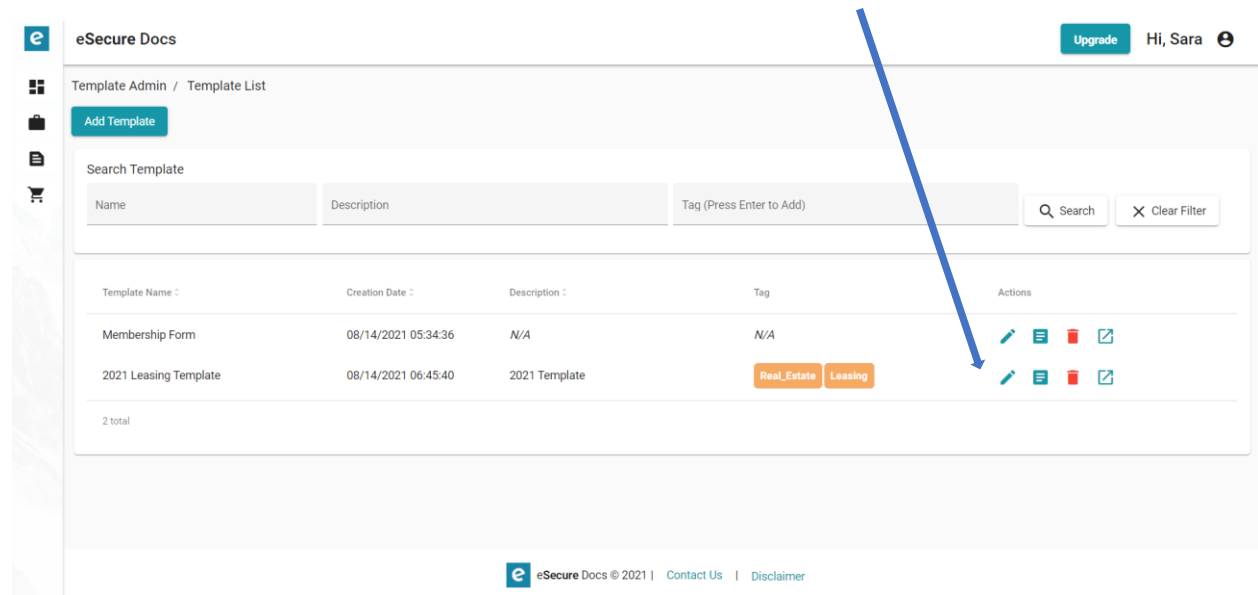


Step 8: In My Templates, click Add Template to add your own template to your library.

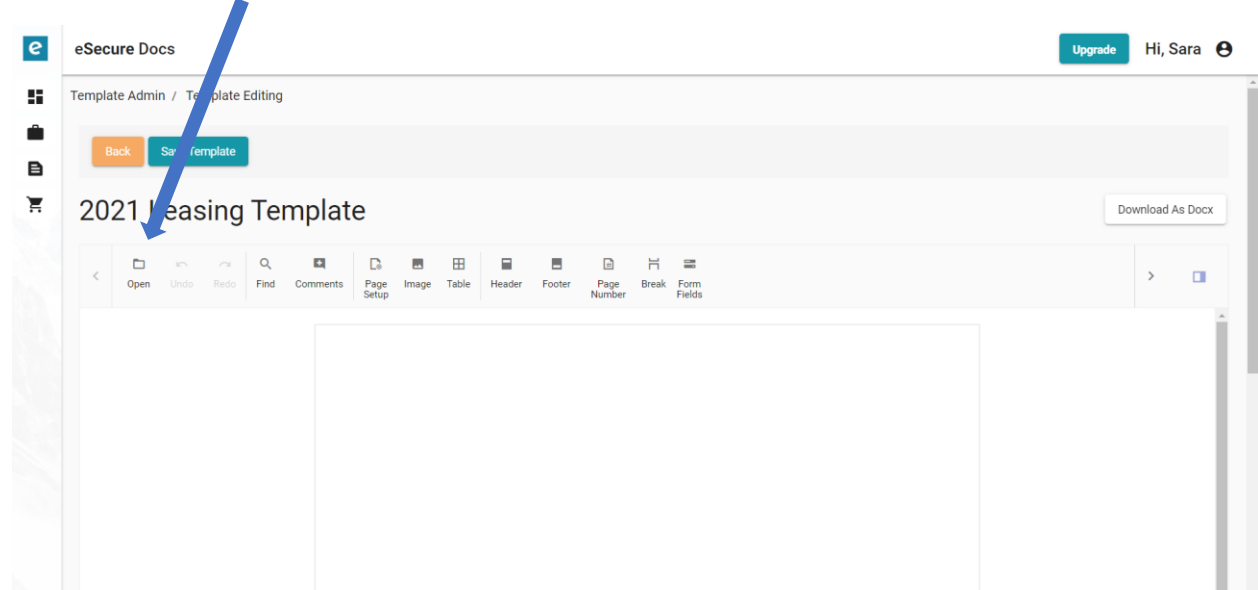
Step 9: To continue adding a template to your library, Name your Template. You have the option to add a description and Template Tags. Hit Save.



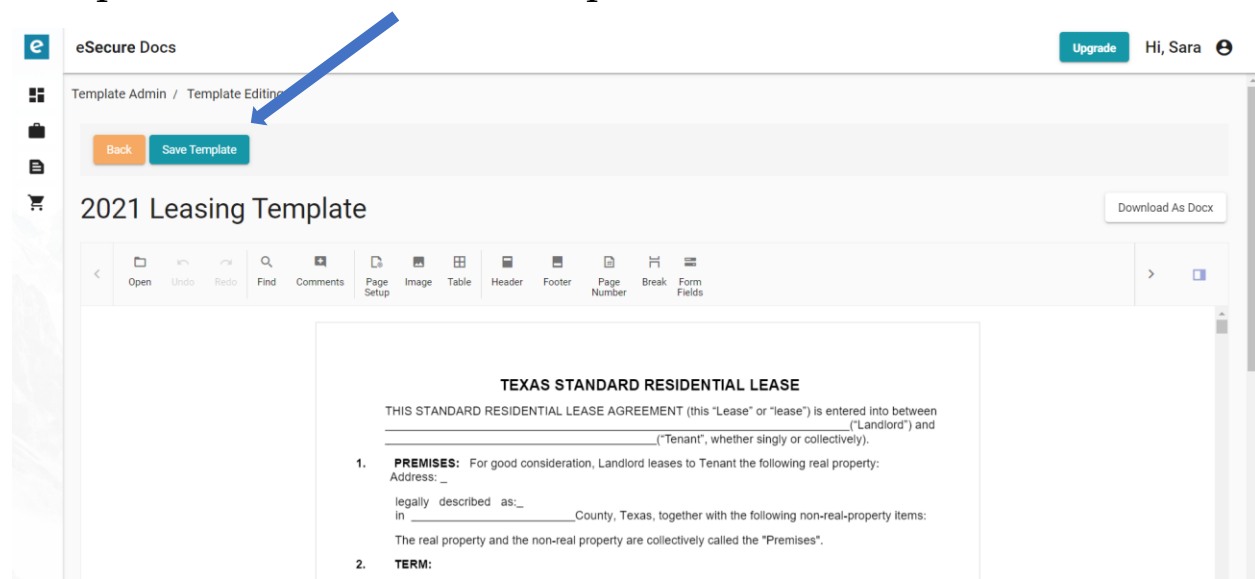
Step 10: Your new Template will show up in 'My Templates'. To upload the document to your template, click the pencil below.



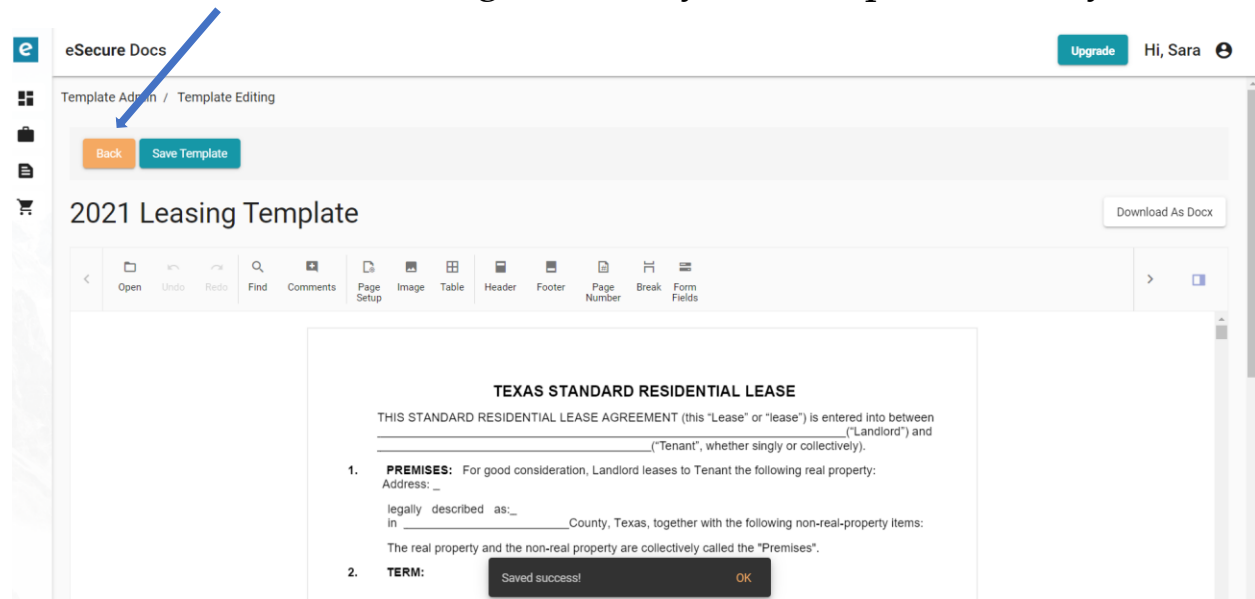
Step 11: Click the open button to upload your template.



Step 12: Load your Template, make any edit changes to your Template, and click 'Save Template'.



Step 13: A pop-up box alerts you that your changes were saved. Click the Back Button to go back to your Template Library



Step 14: A pop-up box alerts you that your changes were saved. Click the Back Button to go back to your Template Library

Step 15: Repeat this process until all of your templates are loaded into your Template Library.

The screenshot shows the 'eSecure Docs' interface. At the top right, there is an 'Upgrade' button and the user name 'Hi, Sara'. The main header indicates 'Template Admin / Template List'. Below this is an 'Add Template' button. A search section titled 'Search Template' includes input fields for 'Name', 'Description', and 'Tag (Press Enter to Add)', along with 'Search' and 'Clear Filter' buttons. The main content area displays a table of templates:

Template Name	Creation Date	Description	Tag	Actions
2021 Leasing Template	08/14/2021 06:45:40	2021 Template	Real_Estate Leasing	[Edit] [View] [Delete] [Share]
Membership Form	08/14/2021 05:34:36	N/A	N/A	[Edit] [View] [Delete] [Share]

At the bottom of the table, it says '2 total'. The footer contains the eSecure Docs logo, copyright information '© 2021', and links for 'Contact Us' and 'Disclaimer'.