



eSecure Docs

Overview of eSecureDocs

How to Create a Document

About eSecureDocs

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

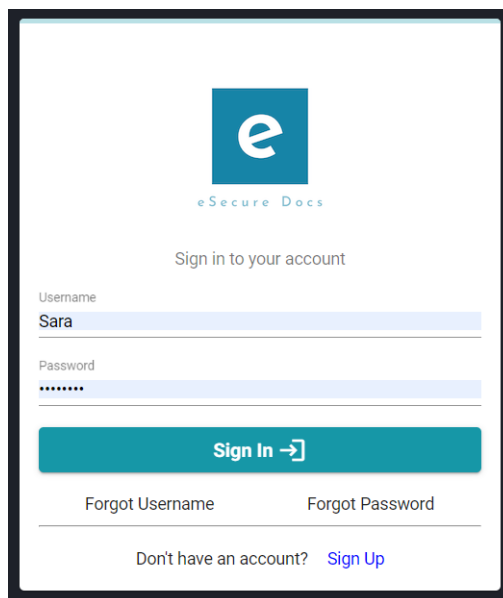
- Create, Share, and Edit a Document Online
- Easily Collaborate on a Document
- Send a Document for eSignature
- Access template resources through Template Marketplace
- Manage your templates on one tool with My Templates

Work Anywhere as eSecureDocs is mobile-friendly.

Getting Started

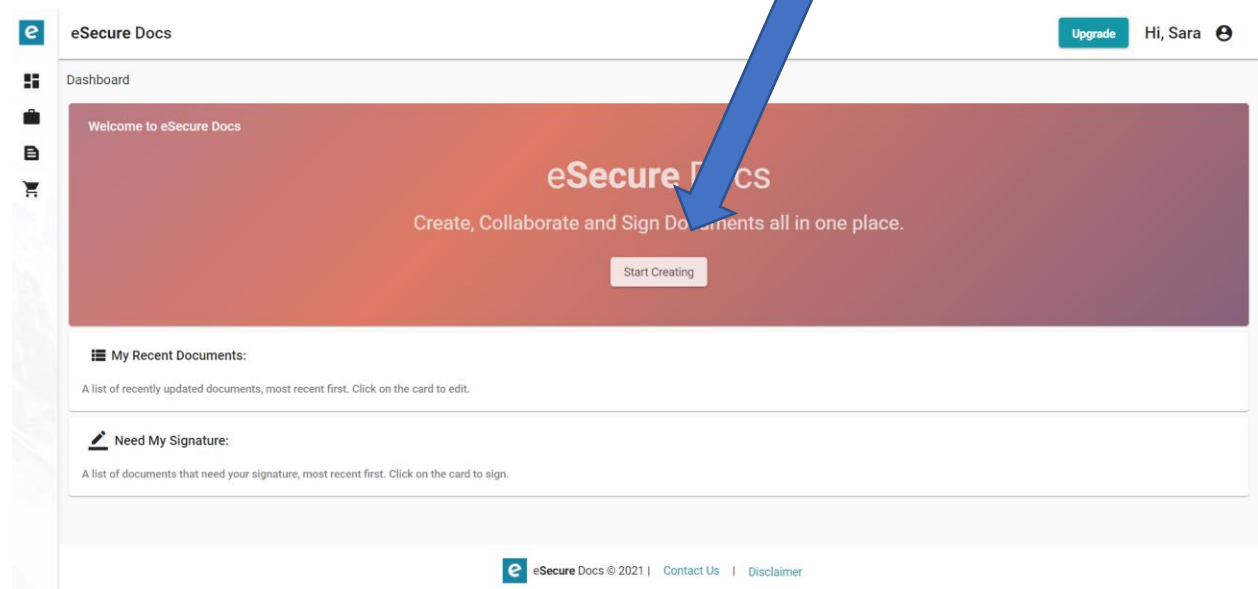
Step 1: Click [Here](#) or go to

<https://tool.esecuredocs.com/sessions/signin> to sign into your account

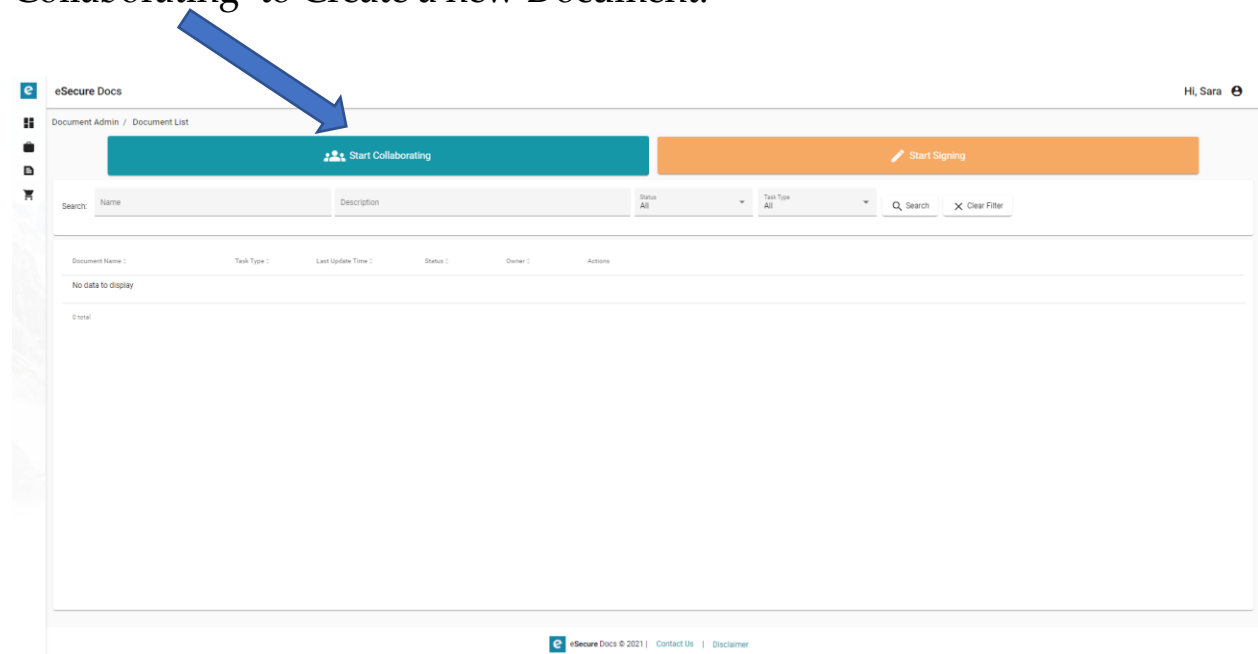


The screenshot shows the eSecureDocs sign-in interface. At the top is the eSecure Docs logo, consisting of a teal square with a white 'e' and the text 'eSecure Docs' below it. Below the logo is the text 'Sign in to your account'. There are two input fields: 'Username' with the value 'Sara' and 'Password' with masked characters '*****'. A teal 'Sign In →]' button is positioned below the password field. At the bottom, there are links for 'Forgot Username', 'Forgot Password', and 'Don't have an account? Sign Up'.

Step 2: On your Dashboard, click 'Start Creating'



Step 3: This takes you to 'My Documents'. From here Click 'Start Collaborating' to Create a new Document.



Step 3: To create a new document, Complete the Below Steps.

- Step 1: Name your Document (Required)
 - Add a Description to your Document (Optional)
- Step 2: Add any Collaborators on the document. (Optional)
 - Add them using an email address or phone number
 - Hit Enter to input each user
- Step 3: Select / Upload Document
 - Select a template from 'My Templates'
 - Upload a file or work on a blank document
 - Tip: Check Marketplace for Templates to add to your library in 'My Templates'

Add Document for Collaboration

Step 1 - Basic Information

Name

Description

Step 2 - Add Collaborators

Tip: type email or phone number and then press **ENTER** to input; or select from recent user list

Recent Users:

e.g. email: xxx@xxx.xxx; phone: xxx-xxx-xxxx

Add User (by email or phone):

Step 3 - Select/Upload Document

Document Options: From Import Blank Document

OR Microsoft Docx Only

Select a template...
2021 Leasing Template
Membership Form

Step 4: Hit Submit

laborating

Add Document for Collaboration

Step 1 - Basic Information

Name
New Member Form - Mary N

Description

Step 2 - Add Collaborators

Tip: type email or phone number and then press **ENTER** to input; or select from recent user list

Recent Users:
Select

e.g. email: xxx@xxx.xxx; phone: xxx-xxx-xxxx

Add User (by email or phone):

Mary Nagler

Step 3 - Select/Upload Document

Document Options: From Import Blank Document

Select a template...
Membership Form

OR

Choose a File
Microsoft Docx Only

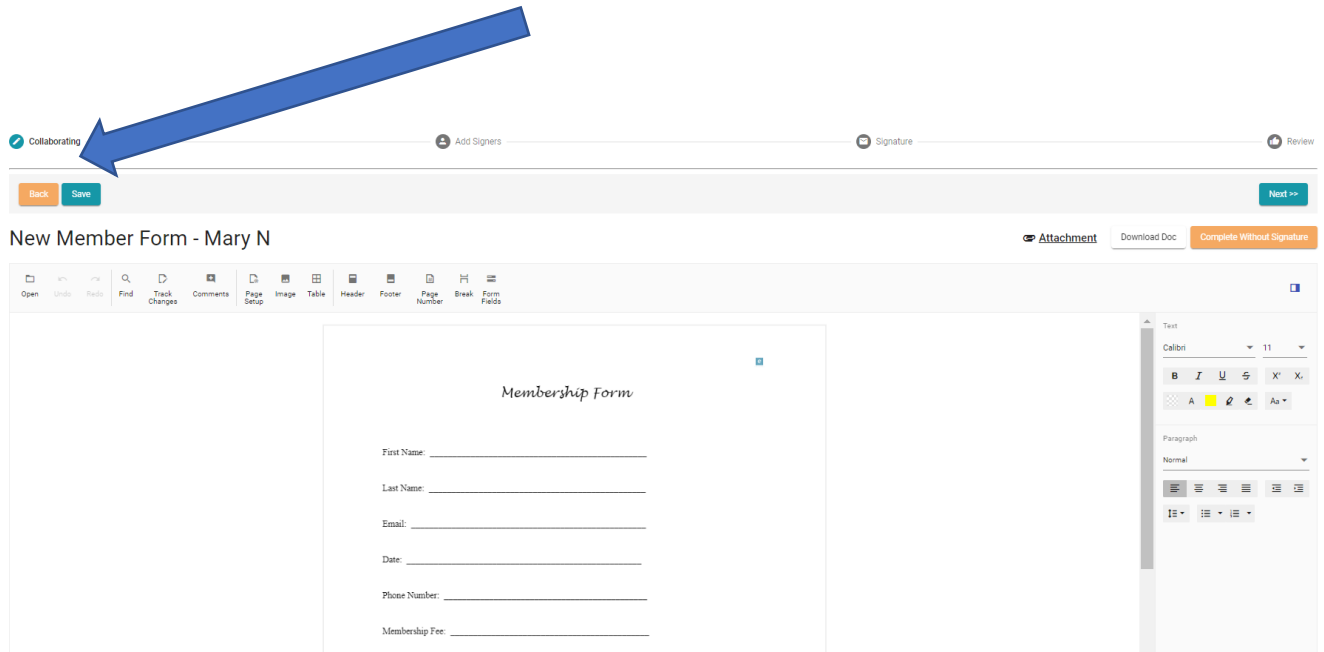
Selected Documents:

- Membership Form

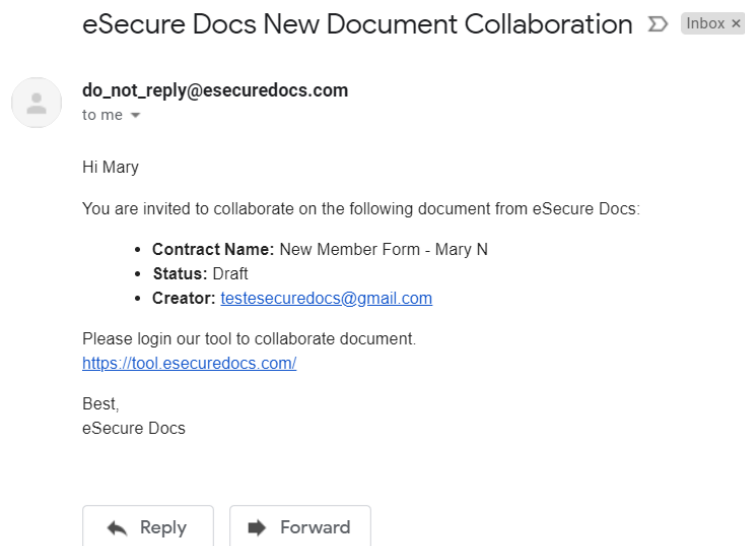
Submit Cancel

Step 5: A new document is now created where you and any collaborators can view/edit the document.

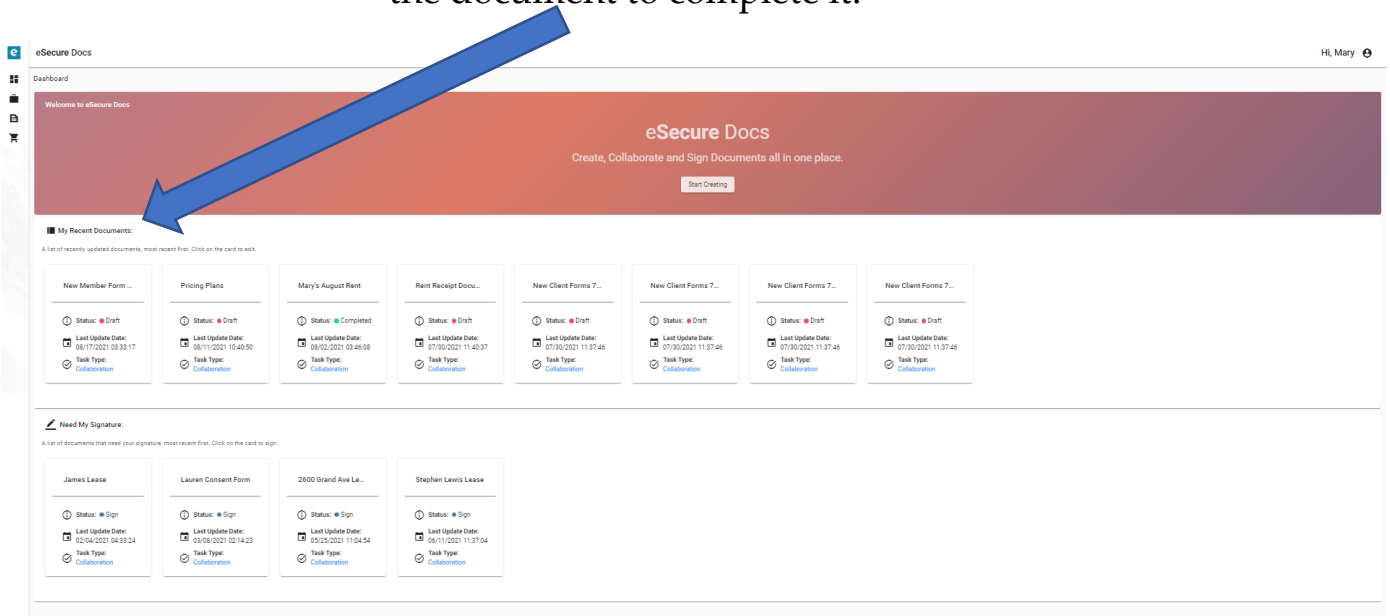
- Make any edits to the document which are needed and then hit the 'back' button. Tip: (Document will be locked if you do not hit back)



Step 6: Any Collaborators will receive an email notification

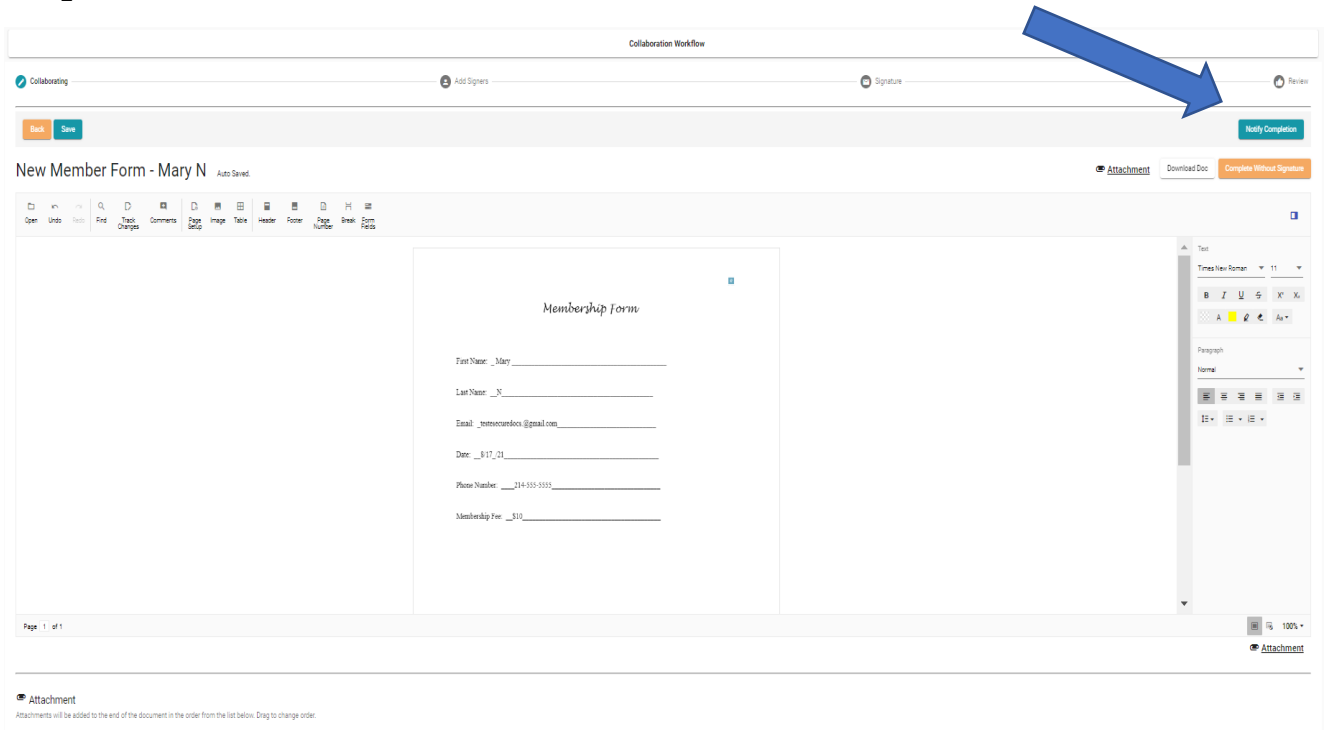


Step 7: Collaborator logs into their account (or creates one) and clicks on the document to complete it.



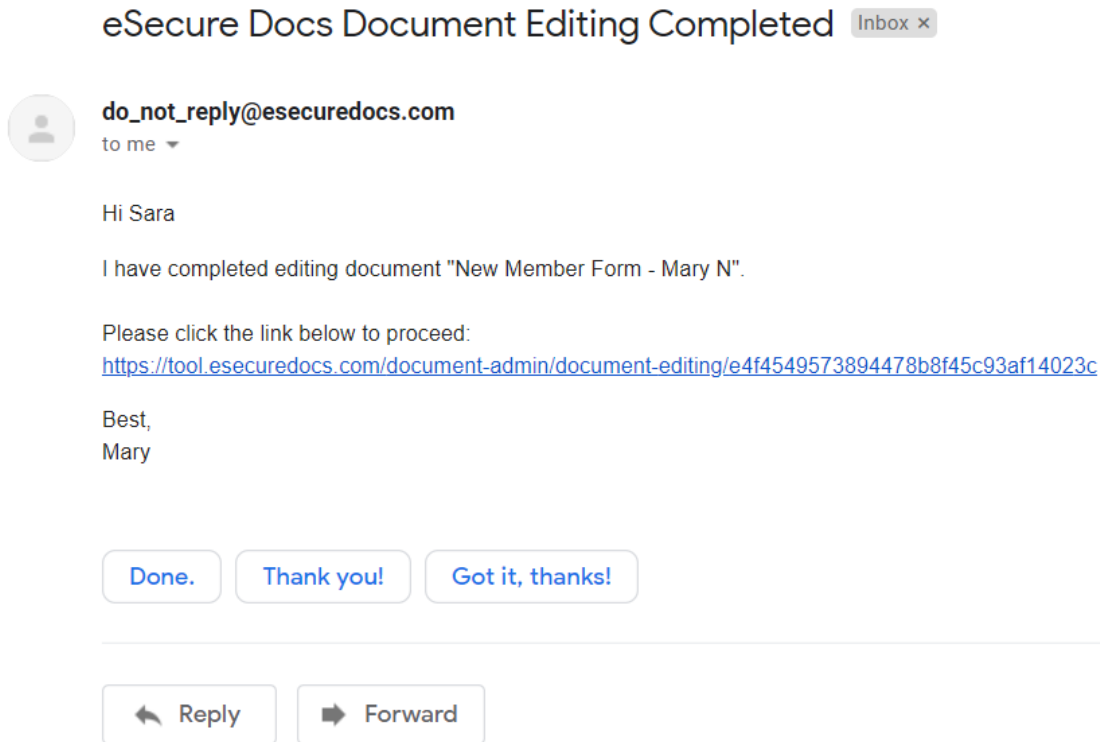
The screenshot shows the eSecure Docs dashboard. At the top, there is a navigation bar with 'eSecure Docs' and 'Hi, Mary'. Below the navigation bar is a large red banner with the text 'eSecure Docs Create, Collaborate and Sign Documents all in one place.' and a 'Start Creating' button. A large blue arrow points from the top right towards the 'My Recent Documents' section. Below the banner, there are two sections: 'My Recent Documents' and 'Need My Signature'. Each section contains a grid of document cards. The 'My Recent Documents' section has eight cards, each with a status (Draft or Completed), a last update date, and a task type (Collaboration). The 'Need My Signature' section has four cards, each with a status (Sign), a last update date, and a task type (Collaboration).

Step 8: Collaborator completes the form and clicks 'Notify Complete'

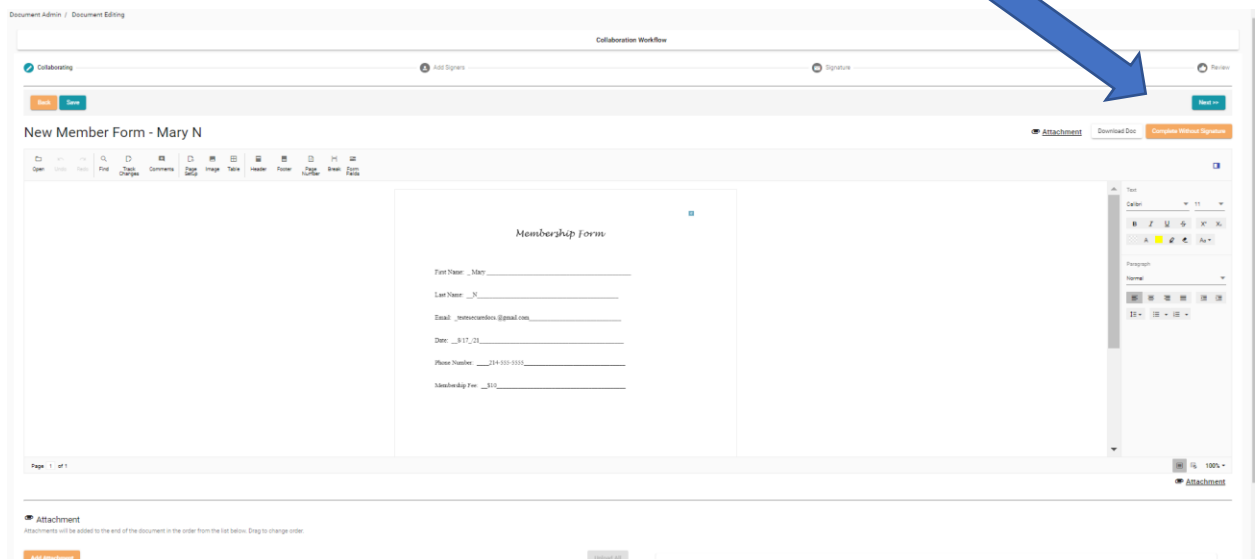


The screenshot shows the eSecure Docs document editor. At the top, there is a 'Collaboration Workflow' bar with 'Collaborating', 'Add Signers', 'Signature', and 'Review' buttons. Below the workflow bar is a toolbar with 'Back' and 'Save' buttons. A large blue arrow points from the top right towards the 'Notify Completion' button. The main content area shows a 'Membership Form' with fields for 'First Name: Mary', 'Last Name: N', 'Email: _@_@_.com', 'Date: __/__/21', 'Phone Number: ___-___-5555', and 'Membership Fee: ___\$'. The bottom of the screen shows a footer with 'Page 1 of 1' and 'Attachment'.

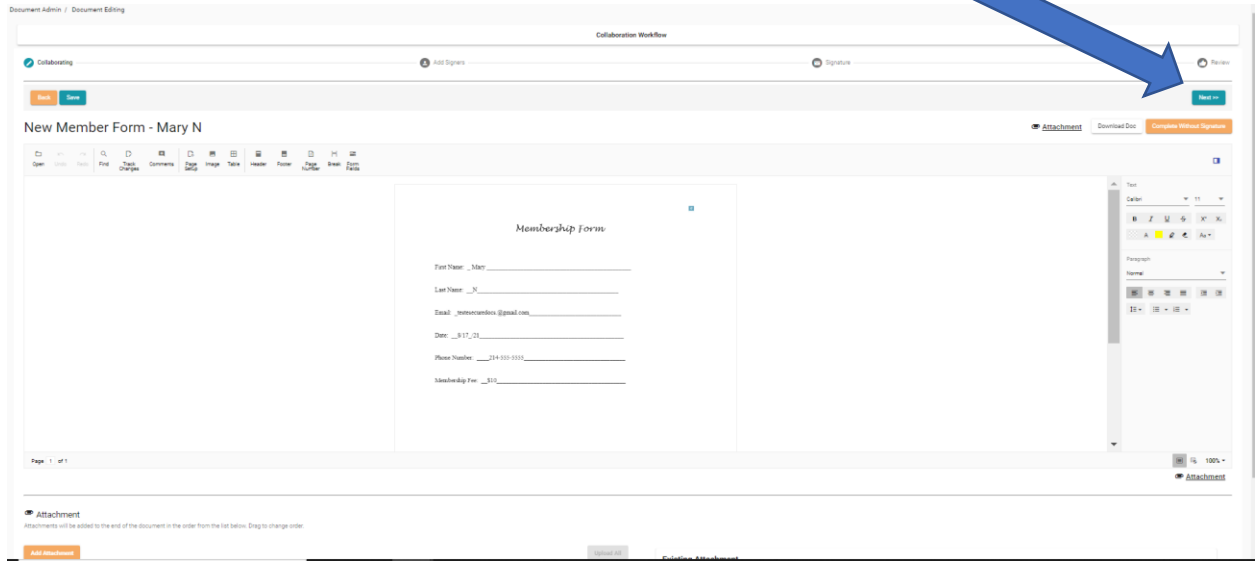
Step 9: Creator of the Document receives an email notification that a collaborator has completed editing the document.



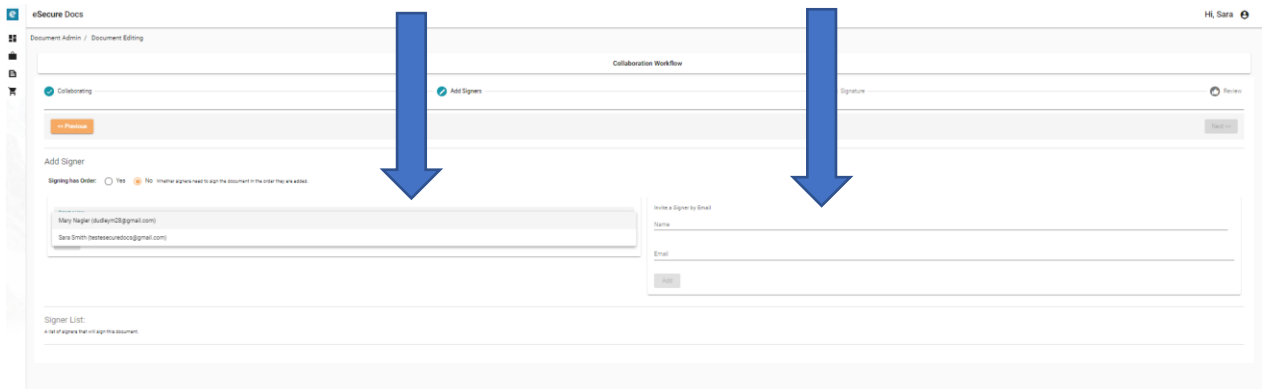
Step 10: a) Document views document. If completed, click Complete Without Signature. The Document Process is completed.



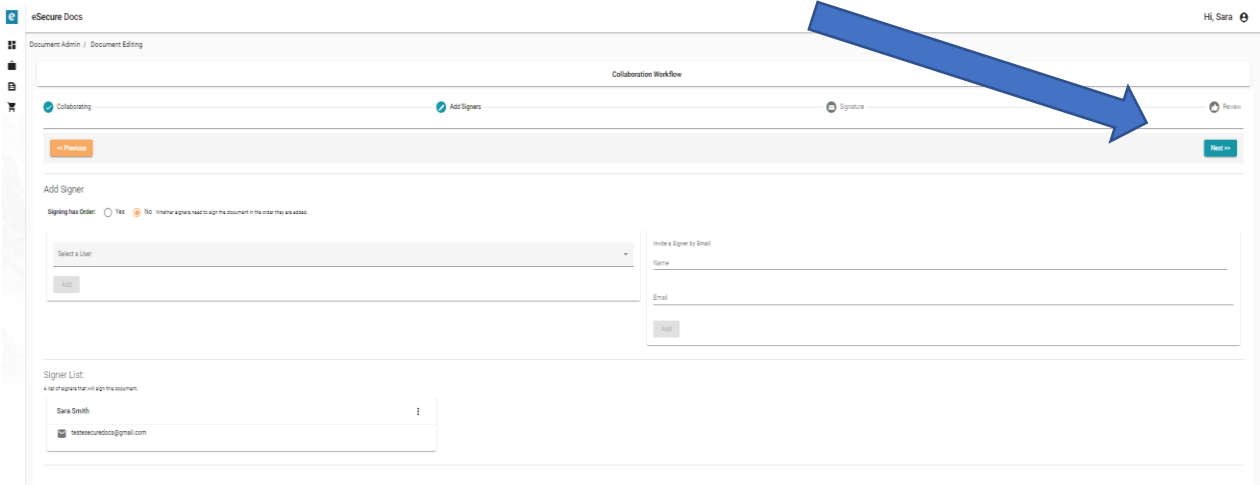
b) If wanting to send the document to Signature, click 'Next'.



Add Any Signers from the drop down box or manually add a signer with their email address.

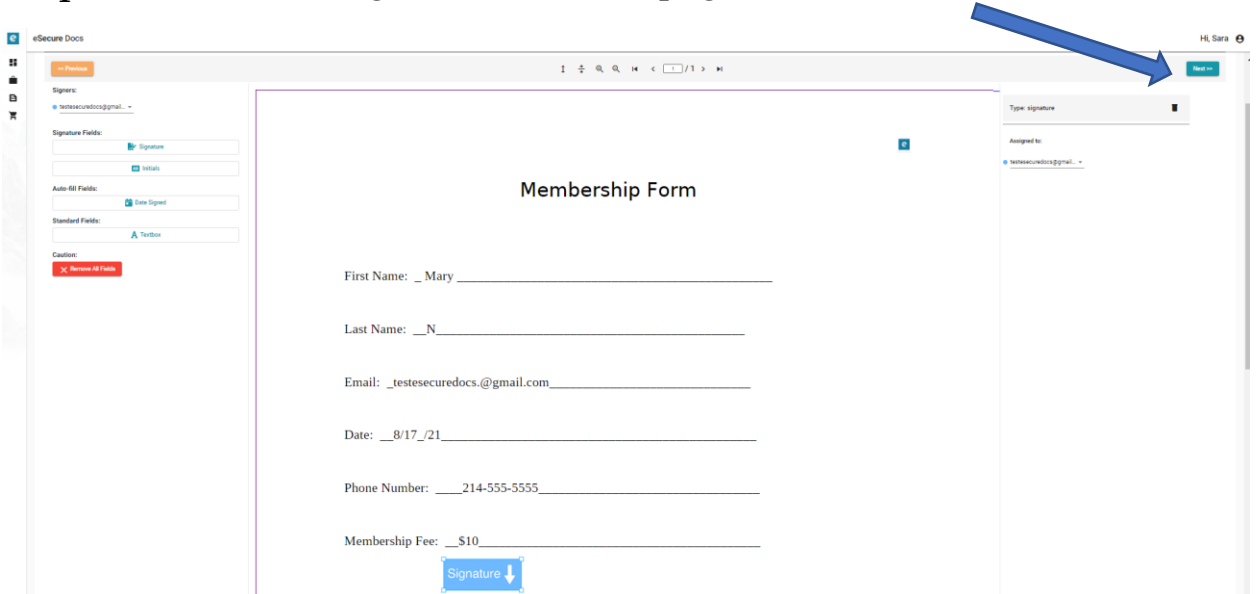


Step 11: Click Next to move to the Signature Page.



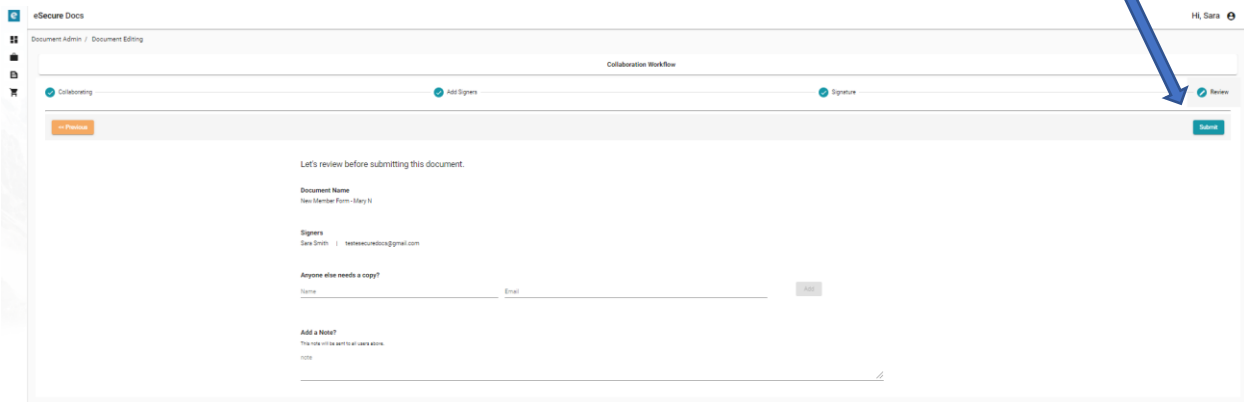
The screenshot shows the 'Add Signer' page in the eSecure Docs interface. At the top, there is a 'Collaboration Workflow' bar with 'Add Signers' and 'Signature' steps. Below this, the 'Add Signer' section includes a 'Signing has Order' toggle (set to 'No'), a 'Select a User' dropdown menu, and a 'Write a Signer by Email' form with 'Name' and 'Email' fields. A 'Signer List' is visible below, showing 'Sara Smith' with the email 'testesecuredocs@gmail.com'. A blue arrow points from the top right towards the 'Next' button.

Step 12: Place the Signature(s) on the page and click 'Next'.

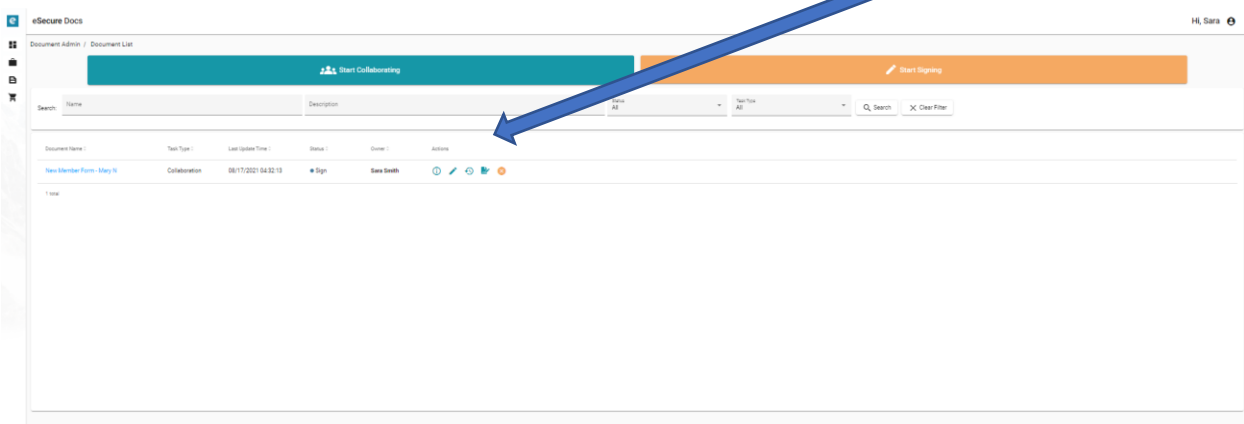


The screenshot shows the 'Signature' page in the eSecure Docs interface. The main content is a 'Membership Form' with the following fields: 'First Name: _ Mary', 'Last Name: _ N', 'Email: _ testesecuredocs.@gmail.com', 'Date: _ 8/17 _/21', 'Phone Number: _ _214-555-5555', and 'Membership Fee: _ \$10'. A blue 'Signature' button with a dropdown arrow is positioned below the 'Membership Fee' field. On the right side, there is a 'Type signature' panel with an 'Assigned to' dropdown menu. A blue arrow points from the top right towards the 'Next' button.

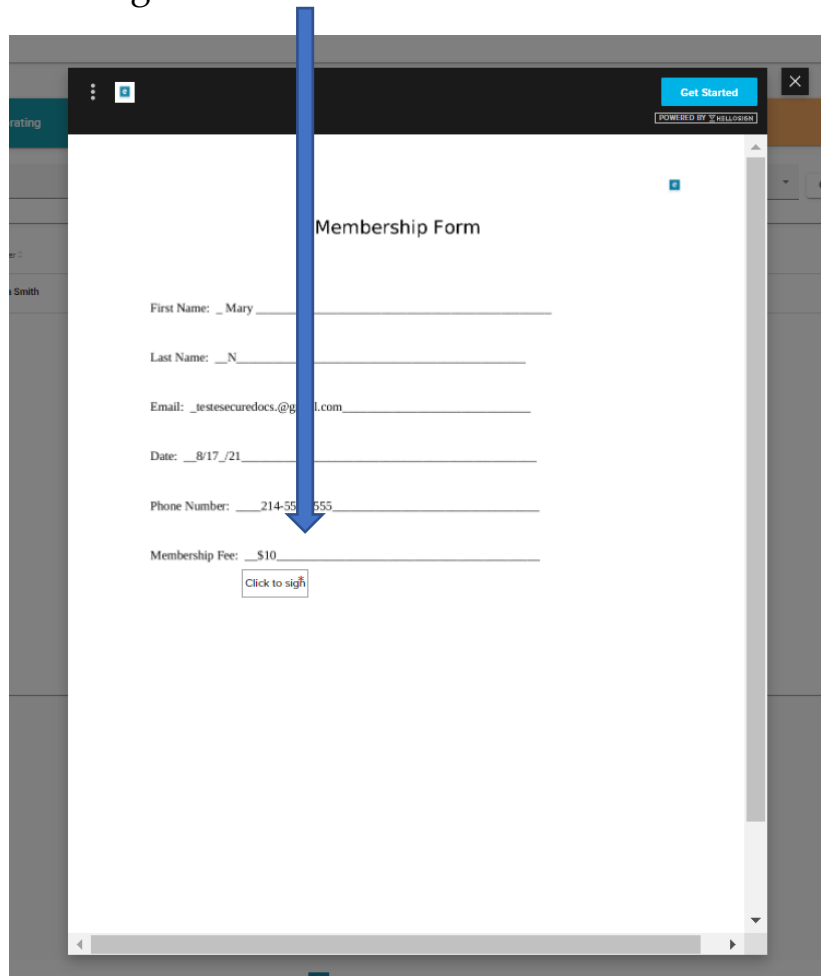
Step 13: Add a note or anyone who needs a copy (optional). Click Submit.



Step 14: Document is out for signature. Click on Signature button to sign.

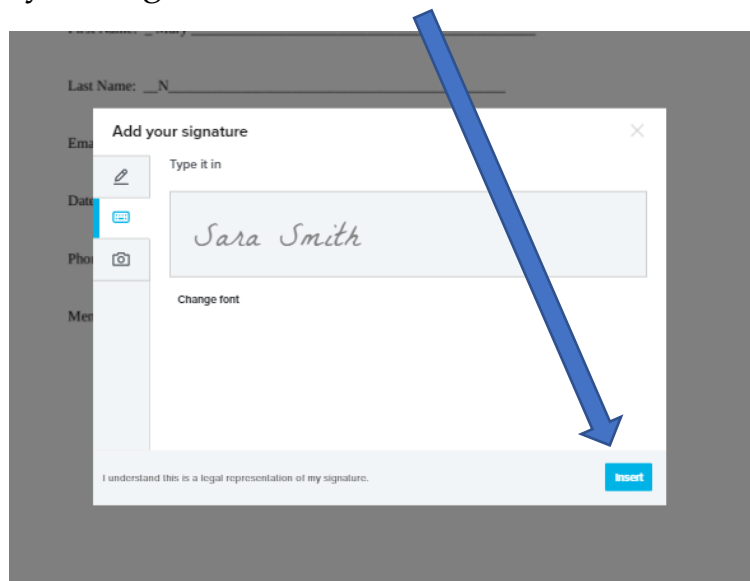


Step 15: Follow Signature Instructions.



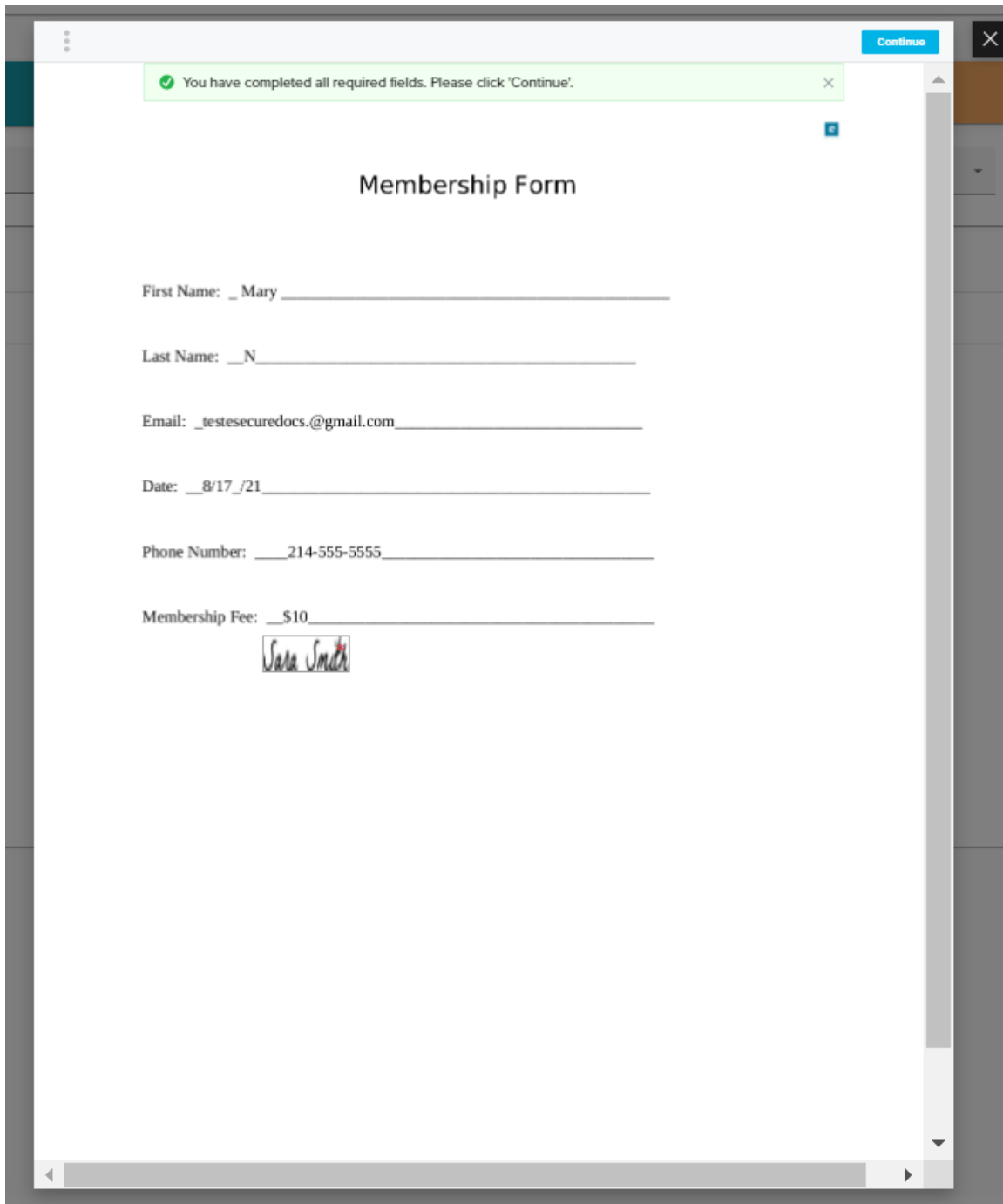
A screenshot of a web browser displaying a "Membership Form". The form fields are filled with the following information: First Name: Mary, Last Name: N, Email: _testesecuredocs.@g...l.com, Date: _9/17/_21_, Phone Number: ___214-55___355, and Membership Fee: ___\$10. A blue arrow points from the top of the page down to a button labeled "Click to sign" located below the membership fee field. The browser's address bar and a "Get Started" button are visible at the top.

Step 16: Add your Signature and Click Insert.



A screenshot of a dialog box titled "Add your signature". The dialog box has a "Type it in" section with a text input field containing the signature "Sara Smith". Below the input field is a "Change font" option. At the bottom of the dialog box, there is a checkbox with the text "I understand this is a legal representation of my signature." and an "Insert" button. A blue arrow points from the top of the dialog box down to the "Insert" button. The background shows a portion of the membership form from the previous step.

Step 17: Click Continue



The screenshot shows a web browser window with a membership form. At the top right, there is a blue 'Continue' button and a close icon. A green notification bar at the top left contains a checkmark and the text: 'You have completed all required fields. Please click 'Continue''. The form title is 'Membership Form'. The fields are filled with the following information:

- First Name: _ Mary _____
- Last Name: __N_____
- Email: _testesecuredocs.@gmail.com_____
- Date: __8/17_/21_____
- Phone Number: ____214-555-5555_____
- Membership Fee: __\$10_____

Below the membership fee field, there is a signature box containing a handwritten signature that reads 'Sara Smith'.

Step 18: Click 'I Agree'

Almost done.
I agree to be legally bound by this document and the [HelloSign Terms of Service](#).
Click on 'I Agree' to sign this document.

Edit [I agree](#)

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Membership Form

First Name:


Last Name:

Email:

Date:

Phone Number:

Membership Fee:



Step 19: Your document is now completed in eSecureDocs!

➤ Click here to download your completed document.

eSecure Docs

Document Admin / Document List

[Start Collaborating](#)

Search:

Document Name	Task Type	Last Update Time	Status	Owner	Actions
New Member Form - Mary N	Collaboration	08/17/2021 04:32:13	Completed	Sara Smith	Info Edit Refresh Download

1 total

