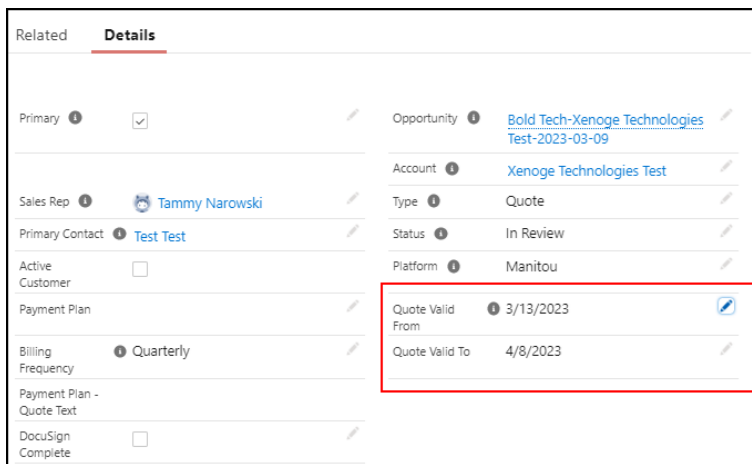


This document provides instructions on how to upload the OAF and SOW and send for signature via DocuSign.

Update “Quote Valid From” and “Quote Valid To” dates

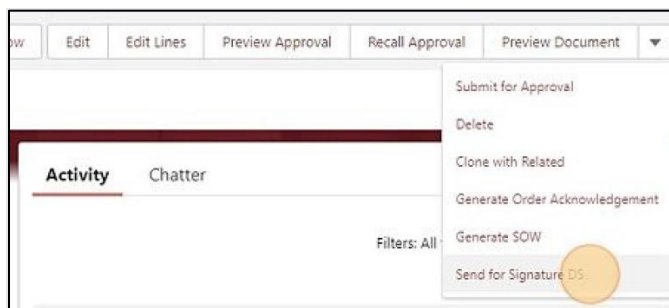
In the Details section of the Quote, update the following fields:

1. **Quote Valid From:** Update this field with today’s date (should be based on when the quote is sent to the customer).
2. **Quote Valid To:** Update this field to 30 days from today.
3. Once these dates are added, **generate** the OAF & SOW again.

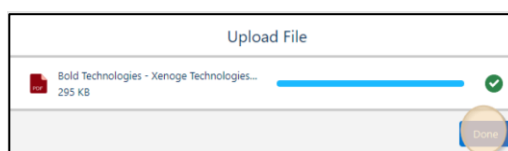
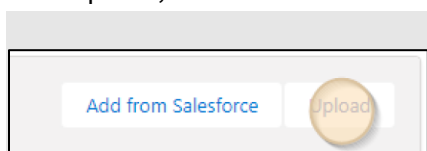


Upload OAF and SOW for signature

1. Click on the drop-down arrow and select **Send for Signature DS**.



2. Click Upload and upload the combined **OAF** and **SOW**.
3. After upload, click **Done**.

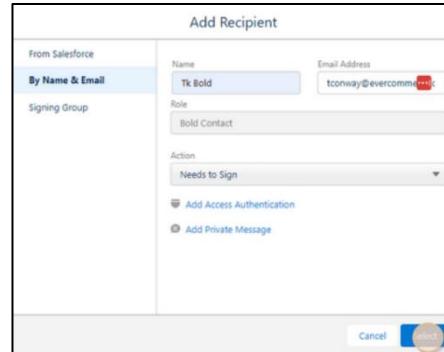


4. Click **Next**.

Send to Customer for Signature

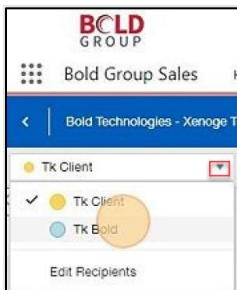
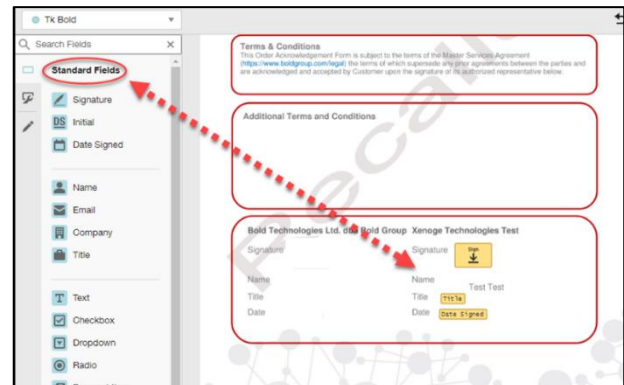
Confirm the correct recipient displays.

1. Verify the customer's **Name** and **Email Address**.
2. Click **Select**.
3. Then click **Next**.



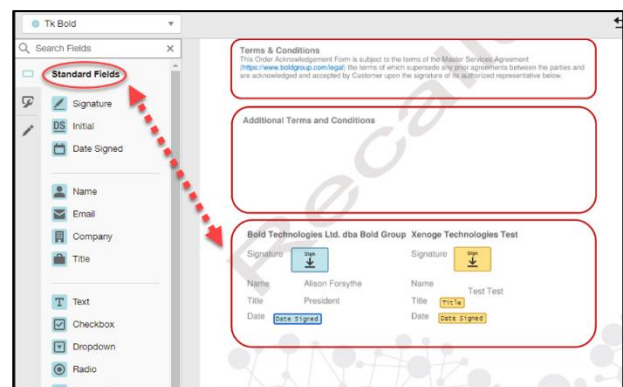
Add OAF for Signature

1. Scroll down to the **OAF** signature box.
2. From the **Standard Fields** column on the left, drag and drop the following into the **Signature Box** for the **customer**, if needed.
 - Signature
 - Title
 - Date Signed
3. Click the drop down arrow next to customer name and select the **Bold contact**.



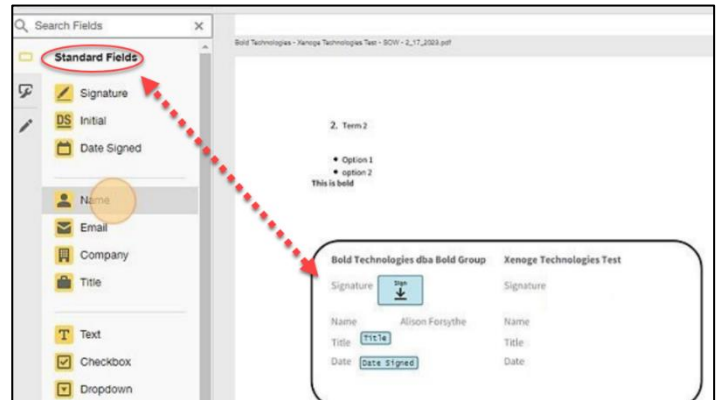
4. From the **Standard Fields** column on the left, drag and drop the following into the **Signature Box** for the **Bold Contact**, if needed.
 - Signature
 - Title
 - Date Signed

5. The **completed** signature box should look like this:

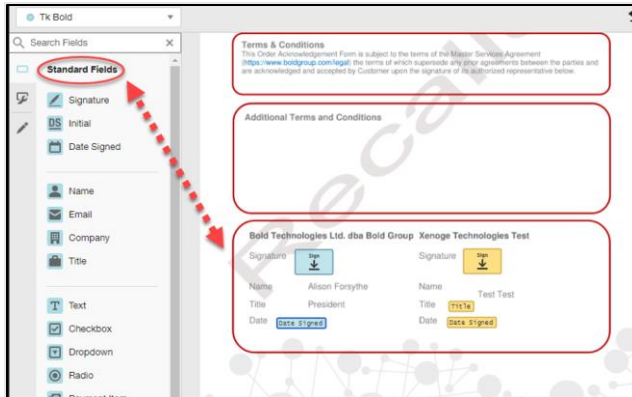


Add SOW for Signature

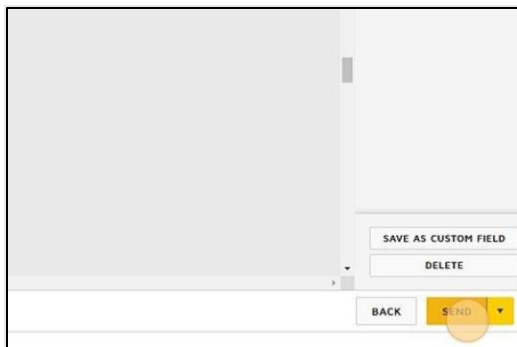
1. Scroll down to the **SOW** signature box.
2. From the **Standard Fields** column on the left, drag and drop the following into the **Signature Box** for the **Bold contact**, if needed. (The drop down menu will default to the Bold contact.)
 - Signature
 - Title
 - Date Signed



3. Click drop down arrow next to Bold contact name and select the **customer's name**.
4. From the **Standard Fields** column on the left, drag and drop the following into the **Signature Box** for the **customer**, if needed.
 - Signature
 - Title
 - Date Signed
5. The **completed** signature box should look like this:



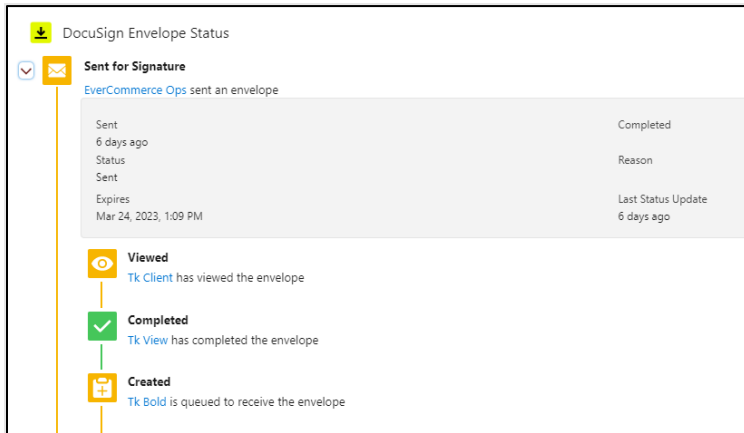
6. Click **Send**.



Viewing Signature Status

To view signature status, there are two options.

1. Check the **Related** tab in the quote. Locate the **DocuSign Envelop Status** and **Sent for Signature**.



2. **Quote DocuSign Status Report**: Click on the **Status** column for the latest status.

The screenshot shows a 'Quote DocuSign Status Report' table. The title is 'Report: DocuSign Status with DocuSign Recipient Statuses' and 'Quote DocuSign Status Report'. There's a 'Total Records' section showing 5 records. The table has the following columns: DocuSign Status: Envelope#, DocuSign Status: Owner Name, Email Subject, DocuSign Recipient Status: Name, Type, Last Status Update, Status, and Expires. The data is as follows:

DocuSign Status: Envelope#	DocuSign Status: Owner Name	Email Subject	DocuSign Recipient Status: Name	Type	Last Status Update	Status	Expires
DSX-0000010 (2)	Tk conway (2)	Bold Technologies - Xenoge Technologies Test - OAF	Tk Bold	Signer	2/22/2023, 12:56 PM	Sent	3/24/2023, 1:56 PM
		Bold Technologies - Xenoge Technologies Test - OAF	Tk Bold	Signer	2/22/2023, 12:56 PM	Sent	3/24/2023, 1:56 PM
DSX-0000011 (3)	Tk conway (3)	Bold Technologies - Xenoge Technologies Test - OAF	Tk Client	Signer	2/22/2023, 1:13 PM	Sent	3/24/2023, 2:09 PM
		Bold Technologies - Xenoge Technologies Test - OAF	Tk View	CertifiedDelivery	2/22/2023, 1:13 PM	Sent	3/24/2023, 2:09 PM
		Bold Technologies - Xenoge Technologies Test - OAF	Tk Bold	Signer	2/22/2023, 1:13 PM	Sent	3/24/2023, 2:09 PM

For a video of this process, [click here](#).