

# RightSignature Cheat Sheet

How to send a document:

1. To get started click Send a Document
2. Click Browse to import a PDF or Word document. You can also select a template if one has been previously set up.
3. Enter each of the recipients that need to sign the document and *always* add yourself as a CC along with anyone else who should be notified when it is complete.
4. Enter the Subject and description of the document(s). There is no need for formatting as this will be removed anyway.
5. Click Next Step

The screenshot shows the 'Send a Document' interface. Red arrows and numbers indicate the following steps:

- 2**: Points to the 'Browse' button under 'Choose a Document'.
- 3**: Points to the 'People Involved' table, specifically to the 'Add Signer' and 'Add CC' buttons.
- 4**: Points to the 'Description' text area.
- 5**: Points to the 'Next Step' button at the bottom right.

The interface includes sections for 'Choose a Document' (Browse, Templates, Packager), 'People Involved' (a table with columns for SIGNER, CC, SEQ, NAME, EMAIL), and 'Description' (Subject and Description text areas).

6. Drag and drop the signature and any other elements onto the document and click Send for Signature

The recipient will get this email:

