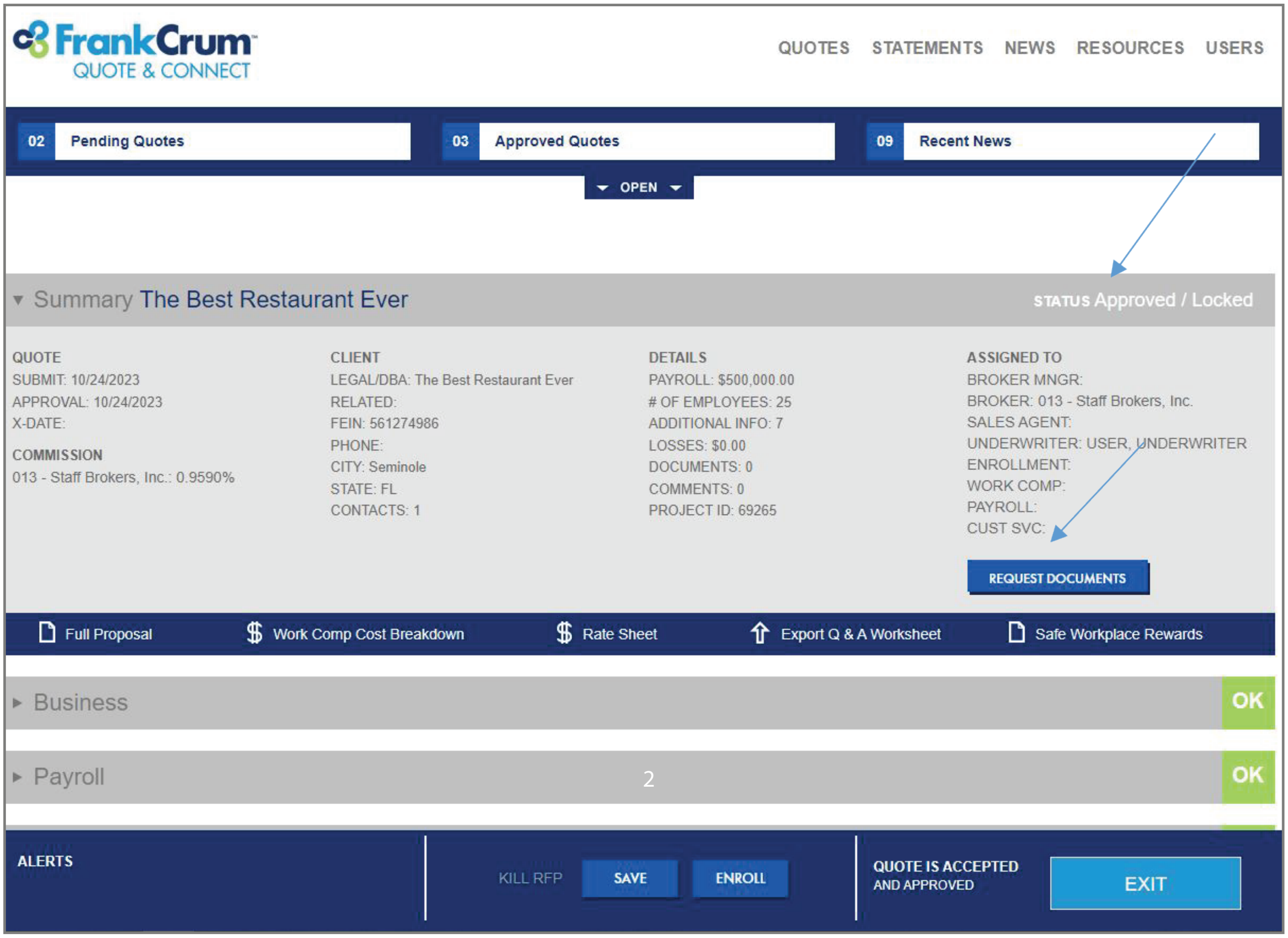
ELECTRONIC DOCUMENT WIZARD

Request and send electronic documents (via DocuSign) to your prospects through Quote & Connect using the **Electronic Document Wizard**.

This functionality is available when the application is in **Approved** status.



The **Request Documents** button opens the **Electronic Document Wizard**. The wizard allows the two required signature documents (Rate Sheet and Identification Form) to be sent to the client electronically via DocuSign.

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ELECTRONIC DOCUMENT WIZARD INSTRUCTIONS

Select a contact from those added to the system during the quoting process or add a new contact to receive documents.

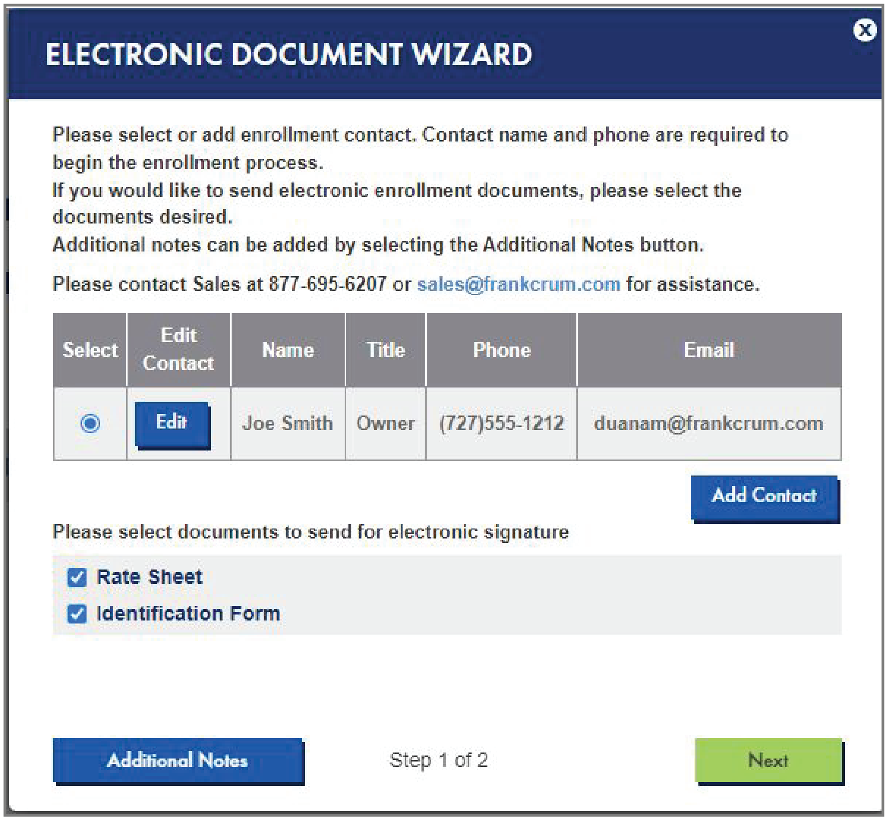
Note: Only one contact may be selected to receive electronic documents.

Step 1

Confirm all contact information is correct, as incorrect information may delay client enrollment. If contact information needs to be updated, press the **Edit** button and a dialog box will be displayed, allowing you to make the desired changes.

If you need to add additional contacts, press the **Add Contact** button. A dialog box will be displayed that will allow you to enter a new contact. After the contact is entered, it will be displayed for selection.

After selecting the contact, choose the documents you wish to send to the client for electronic signature. Then click **Next.**



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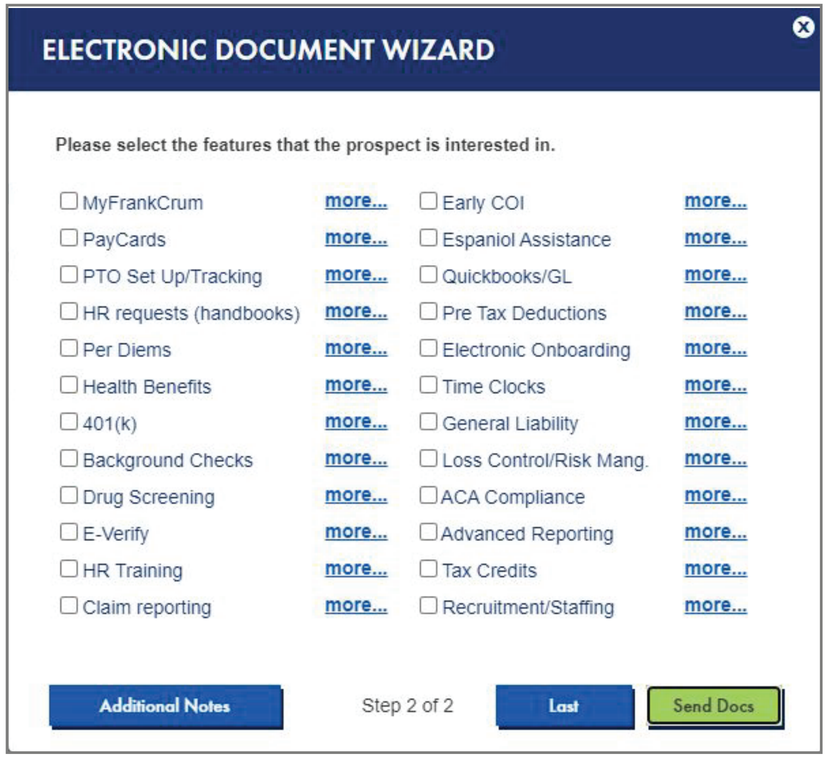
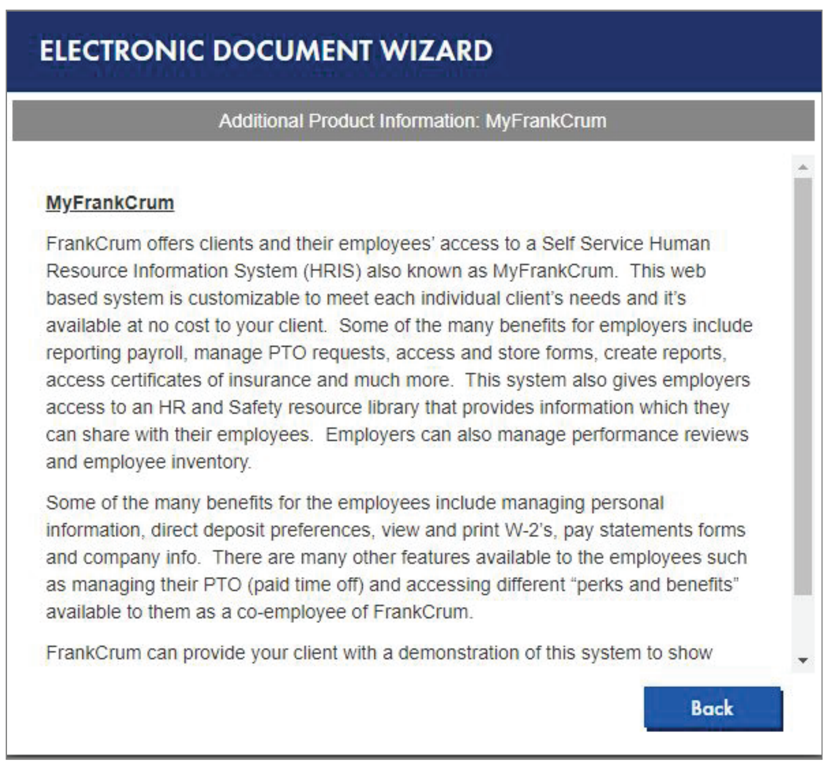
Step 2

Page two of the **Electronic Document Wizard** provides a detailed list of products and services available through FrankCrum. Here, you can select the products and services for which the prospect expressed interest.

a. If you need additional information about an individual item, click **more**… to see additional details that are useful to the sales process.

Press the **Back** button to return to the previous page.





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b. If you would like to add additional instructions for processing the enrollment, press the **Additional Notes** button and a text box will be displayed.

After you are done entering your notes, press the **Back** button to return to the previous page.

c. Press the **Send Docs** button when your input is complete. The wizard will close, and a confirmation message will be displayed indicating the documents were sent.

When the document(s) are electronically signed by the client, Quote & Connect will automatically send the RFP into **Enrollment** status.

Note: Because of the process of gathering the information and transmitting the request to DocuSign, there may be a brief delay between when you order documents and when they are sent to the client's email address.