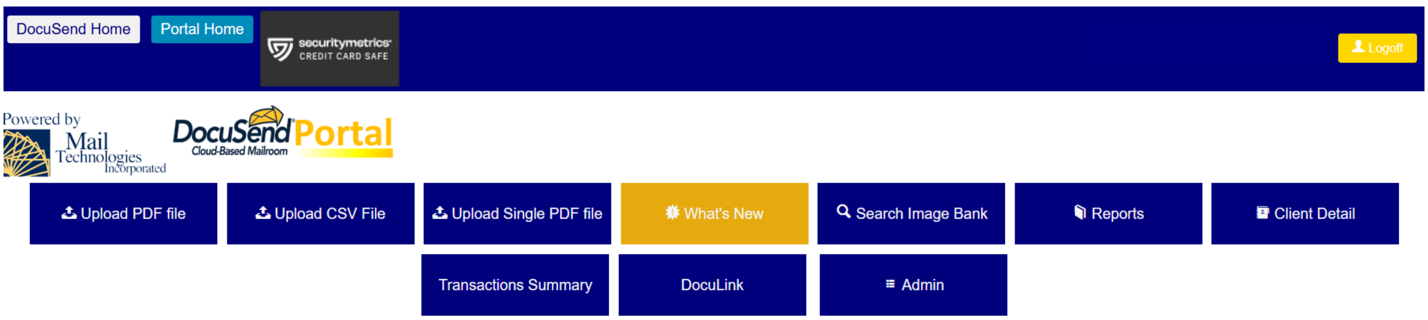
DocuSend Portal User Guide

Log in to your DocuSend Portal https://portal.docusend.biz/



DocuSend Portal: The DocuSend portal gives you secure access to our cloud-based mailroom, where you can manage every aspect of your document distribution process. This guide provides a detailed overview of each feature – from uploading and validating files to tracking mail delivery and managing account settings – **to help you navigate the portal efficiently and use its tools effectively.**

Upload PDF File: Select this tab when uploading your pre-addressed PDF file(s).

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Upload CSV File: Typically used for marketing mail or other documents that do not contain recipient account-specific information. Upload your CSV file with the corresponding mailing addresses, then upload the PDF of the generic document you want to mail. If you have more than 250 addresses, you have the option to send it standard mail instead of first class. https://docusend.biz/mail-merge.php

Upload Single PDF File: Use this tab when you are mailing a single document that does not have a valid mailing address. Just click on Upload a PDF file, add an optional logo, and enter both the return address and recipient mailing address. Click submit, and it will be placed in your shopping cart. We'll create a cover sheet that includes your return and mailing address, and your actual document will start on page 2.

What's New: You'll find important notifications in this tab regarding any new features, rate increases, or other pertinent information.

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Search Image Bank: Access six months of archived documents.

- Search by date range, client name, or account.
- Find your document and click View – this will open an image of the document that was mailed. You can then:
  - Download the PDF
  - Resend via USPS
  - Resend via email (enter email, subject, and message)
- Under the special handling column, you can access the certified mail tracking link, which takes you to the USPS website.
- Access Mail Trail info in the LastScan column, which will show the date of the last USPS scan, and the Facility column, which displays a zip code. When the zip code is the same or close to the recipient’s zip code, the document is most likely in the hands of the USPS postal carrier.
- You can also export this report if you’d like to keep a history for the past 6 months, or if you want to sort the report differently than displayed.
- HIPAA Customers: For HIPAA compliance, uploaded PDFs are permanently destroyed after mailing. As a result, images are not available in the Image Bank. If you require document data for your records, DocuSend can provide it via a custom webhook to securely store in your own system.

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Reports: Access the last 6 months of all your DocuSend orders: a summary of pages, number of envelopes mailed or emailed, NCOA, DPV, Rejected Pages and the total cost for that mailing.

- Click on the file date you'd like to review, and you can continue to drill down to more information.
- Access updated change of address (NCOA) and Mail Trail information:
  - The Special Handling column provides a certified mail link that takes you to the USPS website for tracking info.
  - LastScan is the last date the USPS scanned the envelope, and Facility is the last zip code. When the zip code is the same or close to the recipient's zip code, the document is most likely in the hands of the USPS postal carrier.
- HIPAA Customers: For HIPAA compliance, report data containing document details is not stored in the Reports tab. If you need this information for your records, DocuSend can transmit it securely to your system through a custom webhook.

Client detail: This tab is only available to DocuSend customers who have set up a parent account with child accounts under the parent account.

- Enter a date range and then click on a Company listed under the CompanyName column.
- You cannot access their portal or images, but you can get a listing of details that includes upload date, number of documents mailed and/or emailed, the mailed date, and the status.

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Transactions Summary

Transaction Summary: This feature makes it easy to reconcile your credit card charges. Select a date range to view a summary of all your paid transactions (you can go back to January of the prior year).

- Find the file you would like to view and click on the box under the Invoice column – paid transaction details will be displayed, including the options selected and the cost associated with that mailing.
- View the status of your file – waiting to be mailed or mailed.
- Export the report for your records in CSV format.

DocuLink

DocuLink: See which recipients have not opened their email from you, with the option of resending via USPS. Filter the list by date or email address.

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Admin: Here is where you'll manage your account details.

- Change password.
- Edit company information.
- Edit email information – this allows you to change the subject line and body of the email for those documents that are being sent electronically.
- DocuLink parameters – modify the number of days unopened links should be reported to you.
- Edit Users – add or delete users as well as modify their access.
- Transaction Summary Report by User – enter a date range and see the users, the option details, and the cost associated with each user.
- Transactions Summary – same function as the tab with the same label.
- Show DocuCredit Balance – if you've prepaid or have been issued a credit, you'll see the amount of your credit balance. The credit is applied to your next order.
- DocuCredit Report – lists your transactions in date order with the amount left on your account, as well as the amount of DocuCredit used.
- Report ACH Transfer – use this function when prepaying via ACH transfer, alerting our accounting team that a transfer is in process.
- Referral Link – this is a customized link that you can share with others and earn $0.02/envelope mailed by your referrals.
- Edit QuickPay – this option appears only if you have stored your credit card for faster transactions. Here, you can edit, change, and update your credit card information.

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