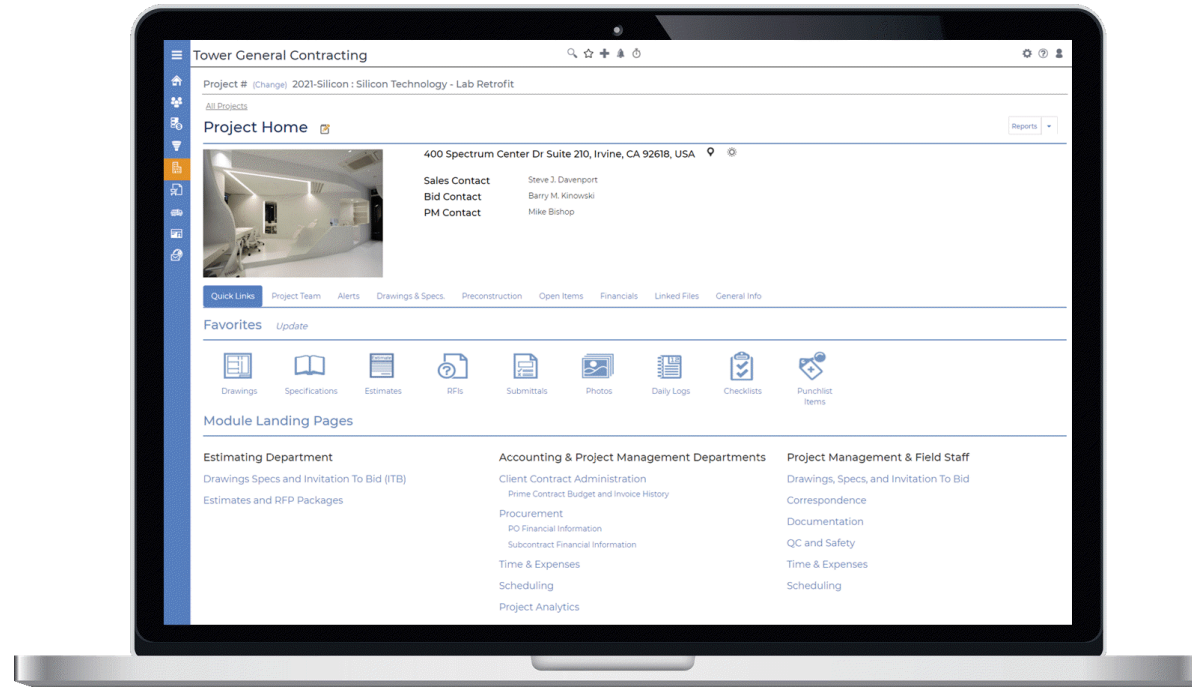




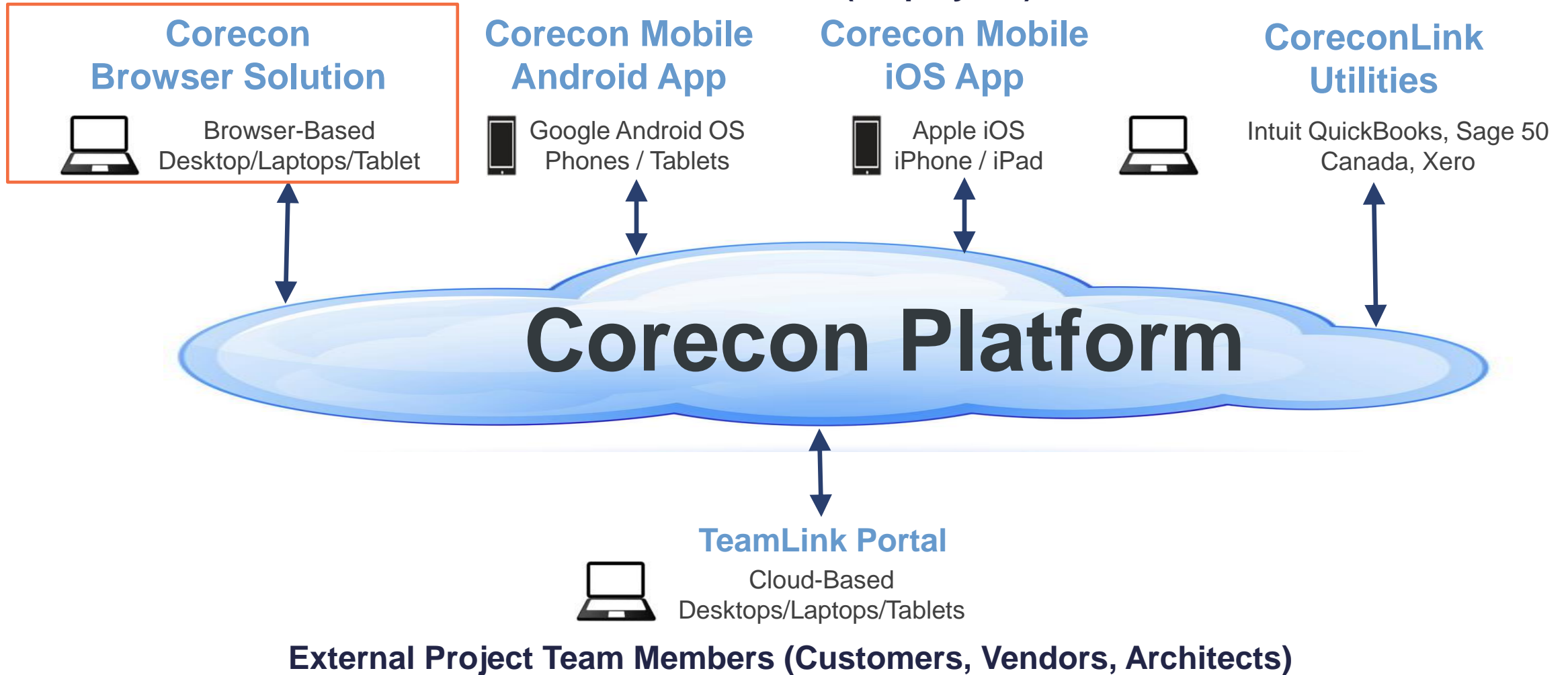
DocuSign®

CLOUD BASED CONSTRUCTION SOFTWARE SUITE | E-SIGN WORKFLOW



A Platform Built for Collaboration & Mobility

Internal Users (Employees)



Step 1 - Enable E-Sign in Corecon Settings

The screenshot shows the Corecon Technologies interface for 'Tower General Contracting'. On the left is a blue navigation sidebar with the following menu items: Corecon Home, Settings Home, Company Settings, Templates & Reports, Feature Settings, Workflow, E-Sign (highlighted with a red box), and TeamLink Portal. The main content area is titled 'E-Sign settings' and contains the question 'Do you wish to use e-sign?'. Below the question are two radio button options: 'Yes' and 'No'. The 'No' option is selected, and the 'Yes' option is highlighted with a red box. A blue 'Save' button is located in the bottom right corner of the settings area.

Step 2 – DocuSign Account Authentication

Corecon technologies
Tower General Contracting

E-Sign settings

Do you wish to use e-sign? Yes No

Which e-sign you want to use?

DocuSign
[Validate DocuSign account](#)

[Save](#)

Select the Features for e-sign

Feature	e-sign?
COs	<input checked="" type="checkbox"/>
CPRs	<input checked="" type="checkbox"/>
Estimates	<input checked="" type="checkbox"/>
Prime Contracts	<input checked="" type="checkbox"/>
Prime Invoices	<input checked="" type="checkbox"/>
SCOs	<input checked="" type="checkbox"/>
Sub Invoices	<input checked="" type="checkbox"/>
Subcontracts	<input checked="" type="checkbox"/>

This will open a window to validate the DocuSign account.

Granular control on what features will use e-sign.

Step 3 – DocuSign Account Validated

Tower General Contracting

E-Sign settings

Do you wish to use e-sign? Yes No

Which e-sign you want to use? DocuSign

Get refresh token Sign Out DocuSign account

Save

Select the Features for e-sign

Feature	e-sign?
COs	<input checked="" type="checkbox"/>
CPRs	<input checked="" type="checkbox"/>
Estimates	<input checked="" type="checkbox"/>
Prime Contracts	<input checked="" type="checkbox"/>
Prime Invoices	<input checked="" type="checkbox"/>
SCOs	<input checked="" type="checkbox"/>
Sub Invoices	<input checked="" type="checkbox"/>
Subcontracts	<input checked="" type="checkbox"/>

Click Sign Out only if you want to disconnect the DocuSign account.

Step 4 – Save Contract Admin or Procurement Document to Linked Files

The screenshot displays a web application interface for 'Tower General Contracting'. The main content area shows 'Prime Contract Invoice Information' for 'Client : Silicon Technology Corporation, Mi'. The invoice details include 'Invoice # 004, Order # 4' with a status of 'Approved'. A table lists project and contract details:

Project	2021-Silicon
Prime Contract	001
Issue Date	02-Sep-2021
Terms	
Payment Due	02-Sep-2021

A 'Select Template' dialog box is overlaid on the page. It contains the following fields and options:

- Format:** Prime Invoice - Fixed Lump Sum - It...
- Template:** Default
- Export Option:** .DOC (Word 2003) (selected)

The 'Export Option' dropdown menu is open, showing the following options:

- .DOC (Word 2003)
- .DOCX (Word 2007)
- PDF (Adobe Acrobat)
- Save DOC to Linked Files
- Save PDF to Linked Files** (highlighted in blue)
- Email DOC (Word 2003)
- Email PDF (Adobe Acrobat)

Step 5 – Initiate E-sign for Linked File

Linked Files Available Storage: 8358.66 MB

Drop files here

Document Name	Document Description	Modified Date ▼	Size	Uploaded By	Show In Portal	
PrimeInvoiceDetails_003_20211115_093846A M.pdf		15-Nov-2021	0.00 KB	Maulik Oza	<input checked="" type="checkbox"/>	<div style="border: 1px solid red; padding: 2px;">Action(s) ▼<ul style="list-style-type: none">DownloadView<li style="border: 1px solid red; background-color: #0056b3; color: white; padding: 2px;">E-signUnlinkDelete</div>

Sent Emails

Date & Time	From Contact	To Company	To Contact
-------------	--------------	------------	------------

Step 5 – Initiate E-sign for Linked File (continued)

Tower General Contracting

[All Projects](#) > [Project Home](#) > [Prime Invoice List](#) > [Prime Invoice Info](#)

E-sign and Document Info

PrimeInvoiceDetails_003_20211115_093846AM.pdf

E-sign Info

[Initiate Esign](#)

Status	Status Date	Sender	Signer(s)
e-signature is not initiated			

Step 6 – Email Required Signers

Tower General Contracting

All Projects > Project List > Project Home > Contract Admin > Prime Invoice List > Prime Invoice Info

E-sign and Document Info

PrimeInvoiceDetails_003_20211115_093846AM.pdf

E-sign Info

Select e-Sign Template: No Selection

Set Signing Order: Sequential Parallel

Order	Name	Email
1	Fred K. Alden	fred.alden@towergc.com
2	Larry Dimster	ldimster@dimsterarchandassoc.com
3	Michael Carroll	mcarroll@silicontech.com

Add Another Signer

Email Template: Default

Email Subject: E-signature of Prime Invoices from Tower General Contracting

Email Message: **Prime Contract/Client Invoice - eSignature**
Client: Silicon Technology Corporation, Attn: Michael Carroll
Contractor: Tower General Contracting, Contact: Fred K. Alden

User's can pick a DocuSign signing template.
E.g. Always require Person A and B to sign documents. This is similar to Corecon's workflow rules.

Corecon auto-fills the signer's based on the type of document.

E.g. Prime Invoice:

- Prime Contact
- Architect (Optional)
- Owner Contact

User's can add additional signers as needed.


User's can pick an email template for sending the e-Sign Document.

Step 7 – E-Sign In Process Indicator

Yellow background indicates signing in process.

Linked Files Available Storage: 8358.66 MB

Drop files here

Document Name	Document Description	Modified Date ▼	Size	Uploaded By	Show In Portal	
 PrimeInvoiceDetails_003_20211115_093846A M.pdf		15-Nov-2021	0.00 KB	Maulik Oza	<input checked="" type="checkbox"/>	<input type="button" value="Action(s) ▼"/>

Sent Emails

Step 8 – Document Status Details

Linked File Detail

Document Name:

Document Description:

Show In Portal:

E-sign Info

Status	Status Date	Sender	Signer(s)
Sent	25-Oct-2021 06:12 PM	Fred Alden	Fred Alden (fred.alden@towergc.com)
Current Status: Completed		fred.alden@towergc.com	Completed
			25-Oct-2021 03:28 PM
			Larry Dimster (ldimster@dimsterarchandassociates.com)
			Completed
			25-Oct-2021 04:39 PM
			Michael Carroll (mcarroll@silicontech.com)
			Completed
			25-Oct-2021 06:12 PM

Document Info

5208657	PrimeInvoiceDetails_004_20211014_025345AM.pdf	View File
	certificate Summary	View File

Linked File Details Form

Document E-sign status

User's can choose to view the signed document or certificates upon completion.

File is downloaded from DocuSign's servers.

Corecon Home Page – New e-Sign Tab

Like Workflow, e-Sign tab will list all document signature activities that are pending, completed or voided in the last 7 days.

The screenshot shows the Corecon Home Page with the 'e-Sign' tab selected in the navigation menu. The page is divided into three sections, each with a search bar and a table of records.

Home

Alerts All Open Items Pending Financials Workflow **e-Sign** Log Reports Old Custom Log Reports

e-Sign Documents Pending

Search

Feature ▲	Project #	Feature Record #	Date	Subject	Amount	Status	Signer(s)
No record found.							

e-Sign Documents Completed in the last 7 days

Search

Feature ▲	Project #	Feature Record #	Date	Subject	Amount	Status	Signer(s)
Prime Invoices	Rad-001	001	16-Nov-2021	All Scopes of Work	\$229,425.00	Completed	Show signer

e-Sign Documents Voided in the last 7 days

Search

Feature ▲	Project #	Feature Record #	Date	Subject	Amount	Status	Signer(s)
No record found.							

Contact Us



5912 Bolsa Ave, Suite 109
Huntington Beach, CA 92649

Tel # (866) 258-6698

Tel # (714) 895-7222

Fax # (714) 895-7022



Email: sales@corecon.com



[LinkedIn](#)



[Twitter](#)