

# Using Correspondence

Sometimes you need to send/request supplemental information while an agreement is in progress. This is when the Correspondence feature comes in handy.

Correspondence allows the publisher of an agreement to add or request additional details with the client or internal teams through Agreement Express. These notes and attachments are added to the document package where applicable, complete with an audit trail of engagement. In addition to reducing friction in the client experience, this capability strengthens your organization's compliance controls by eliminating dependence on untracked email communication.

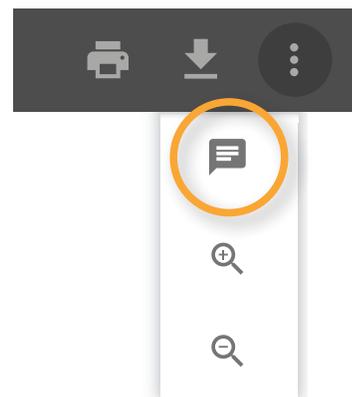
## Common reasons for using Correspondence:

- Collecting additional application detail or supporting documents not enforced in the workflow
- Internally to reach out to a business unit who may not have access to Agreement Express for help/support on applications
- Instant visibility into client interaction for assistants on the team who may be working with the same client
- Supplemental information for compliance teams
- The built-in Comments feature can be used for important notes such as cancelled or stalled cases/transactions

## Show me how:

### STEP 1

Within an agreement, open the extended drop-down menu in the top right hand corner and select the message icon.

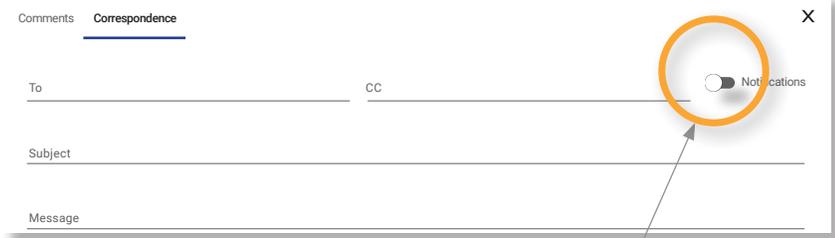


# Using Correspondence

## STEP 2

From the pop-up, click the **Correspondence** tab and select **NEW**. The popup will expand to reveal messaging fields.

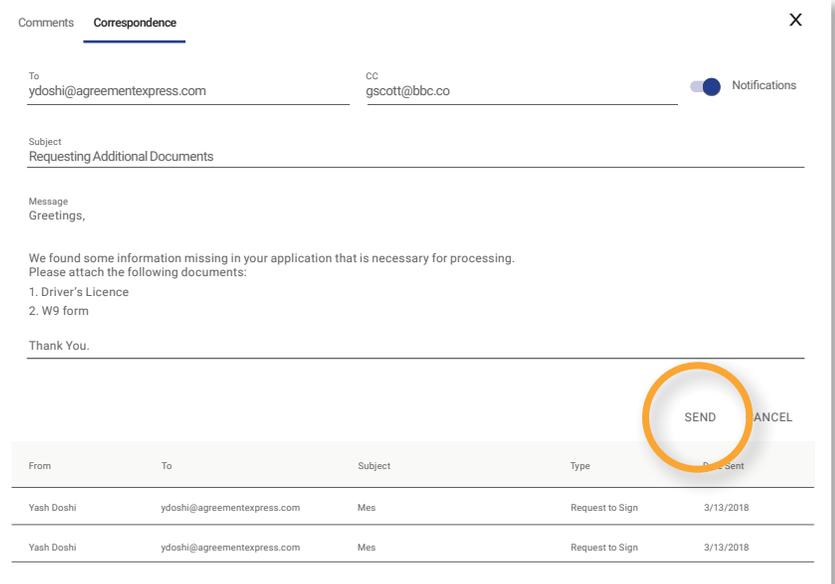
Here's where you add the designated recipient's email address, any contacts on cc (separated by commas), the email subject line, and your message.



**Tip:** Toggle **Notifications** on to be notified when you receive a response.

## STEP 3

Hit **Send** on your message when you're ready.



From	To	Subject	Type	Time Sent
Yash Doshi	ydoshi@agreementexpress.com	Mes	Request to Sign	3/13/2018
Yash Doshi	ydoshi@agreementexpress.com	Mes	Request to Sign	3/13/2018

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## STEP 4

### What does the recipient see?

The recipient is sent an email with your message and a link to a secure Agreement Express page for submitting their response. (This email can be customized by company or transaction.)

**Note:** *Anyone on your cc list receives the same message, without the link to respond.*

From: Yash Doshi <ydoshi@agreementexpress.com>  
Date: Wed, Mar 14, 2018 at 11:39 AM  
Subject: Requesting Additional Documents  
To: <ydoshi@agreementexpress.com>

Greetings,

We found some information missing in your application that is necessary for processing. Please attach the following documents:

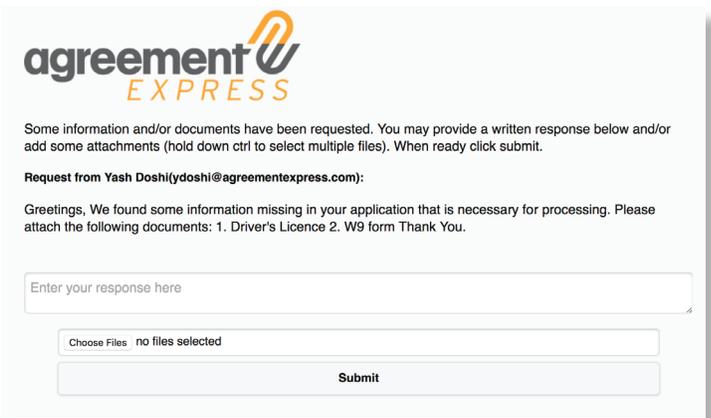
1. Driver's Licence
2. W9 form

Thank You.

Please respond [here](#)

## STEP 5

After clicking through to webpage, the recipient can add their comments and/or upload their attachments.



agreement  
EXPRESS

Some information and/or documents have been requested. You may provide a written response below and/or add some attachments (hold down ctrl to select multiple files). When ready click submit.

**Request from Yash Doshi(ydoshi@agreementexpress.com):**

Greetings, We found some information missing in your application that is necessary for processing. Please attach the following documents: 1. Driver's Licence 2. W9 form Thank You.

Enter your response here

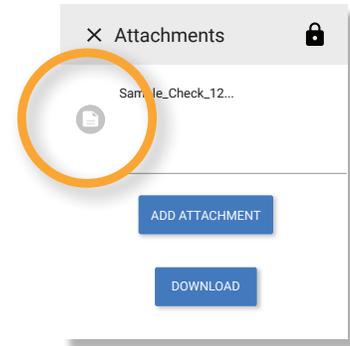
Choose Files no files selected

Submit

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## STEP 6

Attachments provided by your recipient will be incorporated into the document package. To review, go into the transaction and click the paperclip icon in the top right. You'll see the attachment in the list.



## STEP 7

You can review Correspondence by re-visiting the Correspondence tab of the transaction at any time. To review a message, simply click the subject line of an email to expand the window for a full-text view.

**Tip:** If you received a response to your Correspondence outside of Agreement Express, you can mark this status for your records by expanding the message and clicking **MARK RESPONDED**.

Comments		Correspondence			
From	To	Subject	Type	Date Sent	
Yash Doshi	yashtest@qa.aexclienttest.net	Mes	Request to Sign	3/13/2018	
Yash Doshi	ydoshi@agreementexpress.com	Mes	Request to Sign	3/13/2018	
Yash Doshi	gscott@bbc.co	Requesting Additional Documents	Correspondence	3/13/2018	
Yash Doshi	ydoshi@agreementexpress.com	Requesting Additional Documents	Correspondence	3/13/2018	
Agreement Express	ydoshi@agreementexpress.com	Correspondence Has Been Responded To	Correspondence Response	3/14/2018	NEW

## ABOUT AGREEMENT EXPRESS

Agreement Express is the leading client onboarding platform for financial services. The Agreement Express platform allows financial institutions to design and execute consistent, automated onboarding experiences across their product offerings and channels, while providing deep analytics that enable proactive and personalized client advice. The platform is the first of its kind to help top performing firms gather, use, and reuse client data to improve and evolve rich customer experiences. Agreement Express enables Fortune 500 financial institutions around the world to provide best-in-class digital onboarding to their clients and grow their business.