

Envelope Create Wizard

The "envelope create" wizard can be opened using the green button "NEW DOCUMENT" in the menu bar on the left side, or by using one of the tiles on the dashboard which create a new draft.

Beside the options which create a new draft from scratch, following actions open the Envelope Create Wizard:

- When continuing a draft (by using the "Continue" action on an item in one of the envelope filter views), the Envelope Create Wizard will be opened again to configure the draft (and finally send the envelope)
- When using a template, a new draft based on the template will be created and the Envelope Create Wizard will be opened
- In an integration scenario (See Integration Guide), the itegrator can use the Envelope Create Wizard to allow interactive editing of a draft before sending.

The Envelope Create Wizard consists of minimum 3 pages, and can be extended by additional customer-specific pages. We will have a look on the different pages in following sub chapters:

- [Recipients Page](#)
- [Designer Page](#)
- [Summary Page](#)
- optional: additional pages provided by the integration layer ([Custom page before Sending](#))