Getting Started with Nitro Cloud

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Contents

Add a Document	3
View Status & History of a Document	4
Request a Signature	5
Setting a Signing Order	6
Creating & Using Templates	7

Nitro Pro Integration

Getting Started	8
Saving to Nitro Cloud	9
Request a Signature	10
Share a Document	11

Add a Document

Use any of the following methods to add a document to Nitro Cloud



Through the Web Browser

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				1.	Open your we	b browser	
				2.	Go to <u>cloud.g</u> e	onitro.com and si	gn-in
	Welcome Back to N	itro Cloud		3.	Click Add at th	ne top right-hand o	orner
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	Email				your local ma	chine, or choose t	0
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	You have successfully logged out.	My Documents	Q T			÷ = Add	
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\Rightarrow	Don't have a Nitro account?	Tools	My Computer		$\mathbf{\hat{\mathbf{v}}}$	sading.	
		Archive	box Box	You can upload man PDFs, images, i	y types of documents, including Microsoft Word, Excel and		
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					Cancel Add Document		
Drag-and-D	Drop		_				

- 1. **Open** your web browser
- 2. Go to <u>cloud.gonitro.com</u> and sign-in
- 3. Click Add at the top right-hand corner
- 4. From your machine drag and drop a file into the middle of the web browser window

New entries in your documents list will appear and you will be notified once all documents have finished uploading.

Tips & Tricks

You can upload many types of documents, including PDFs, Images, Microsft Word, Excel and PowerPoint files. Once you upload documents, Nitro Cloud will automatically convert them to PDF. You can also upload documents via Nitro Pro. To find out more, refer to the <u>Nitro Pro Integration</u>.

View Status & History of a Document

Nitro Cloud gives you the ability to view the status and information of documents you have uploaded, as well as shared documents



Viewing the Document Information

- 1. **Open** a document for viewing
- 2. In the top right click the **Info** button
- 3. A drawer opens from the right-hand side with 4 tabs showing additional information

Learn to eSign in Seconds	(i) Document Details X
Sign Request Create Link Share Combine Optimize Convert to Show Notes Manage Document Doc Doc Versions	Activity Notes Info Analytics Cloud Demo 05/15/2017 02:32 Document Viewed
Signing documents has never been easier with Nitro Cloud.	
Click the "Sign" icon in the top ribbon and select the option "Me & Others" under "Who needs to sign?" Just add your recipient, and then you'll be able to create your signature and place a field for your recipient's signature below.	
It's easy, fast and secure—try it now to see for yourself! YOU: Signature:	
Name: Name:	

Additional Information

Activity - shows all actions applied to the document, including when and by whom.

Notes - shows any notes and markups such as highlights that have been added. These features are available in the Review tab.

Info - includes the File details such as size and number of pages, and the list of people who have access to the document.

Analtyics - shows the viewing history of each person who has access to the document including pages they viewed and time spent.

Request a Signature

This article outlines the various ways to start a Signature Request workflow in Nitro Cloud



Learn to eSign in Seconds

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Starting a Request Signature Workflow

- When viewing a document choose Request
 Signature from the Home or Share tabs
- From the My Document list, click the arrow for the Quick Actions Menu and choose Request Signature
- From Nitro Pro, follow the Request a Signature instructions here



Sending a Signature Request

- Upon entering the Request
 Signature workflow, a dialog to Add a
 Recipient will show. Enter the Recipient's
 name, email address, then click Add
- Drag and Drop from the Add Fields menu onto the document, and upon completion click Continue
- Verify the custom message you would like to send and confirm with

nd upon Just add your re field for your re It's easy, fast an You: Recipient: Signature: Name: Name

• Name

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Add Text and Signature

Learn to eSign in Seconds

Add a Recipient

Harold Finch

Request Signature

Additional Information

You can add multiple signers by clicking the **Add Recipient** button on the left hand side more than once. Each click will prompt you to add another signer for the workflow. Also note that each field can be moved, resized, and from the tooltip you can change the field type as well as the recipient. If you wish to come back to the workflow at a later date, simply click **Save Draft** to keep this workflow.

Setting a Signing Order

Nitro Cloud allows you to send multiple signature requests under the one workflow/document, as well as set a signing order.

Setting a Signing Order

- 1. Begin a **Request a Signature** workflow
- 2. Add 2 or more signers
- 3. Check the box for **Set Signing Order**
- 4. Drag and drop the Signer cards to the desired order and finish the workflow as normal



Did you know?

Outside of requesting signatures from a single or multiple people with a signing order, you can also **CC** people once the workflow is complete. This option can be set on the final window when performing a Signature Request by entering an email under the **CC** section.

Creating & Using Templates

Templates are used to speed up repeatable signature requests by saving a document with the fields already present and in place



Creating & Using Templates

- 1. Begin a **Request a Signature** workflow and go through it up until the custom messaging
- 2. Ensure that **Save as Template** is checked and finish the workflow to keep the template
- 3. To re-use the template go back to the Home Dashboard and choose **Templates**
- 4. Click the down arrow on the template you wish to use and choose Use Template

×	Add Text and Signatures Learn to eSign in Seconds	
To the set of th	Document Preview Click the "Sign" icon in the top ribbon and select the option "Me & Others" under "Who needs to sign?" Just add your recipient, and then you'll be able to create your signature and place a field for your recipient's signature below.	
Message Hi,	It's easy, fast and secure—try it now to see for yourself!	c)
Can you please sign Learn to eSign in Seconds? - Cloud Demo - Could D	YOU: Signature: Signature: Signature: Name: Name: Anse: Image: Image	

Additional Information

Have an updated version of the document than the Template used? That's fine! Once you choose to use the template, click **Swap Document** to replace it with a new one. Particularly useful if your templates are occasionally updated.

Nitro Pro Integration

Getting started with Nitro Cloud in Nitro Pro



Cloud Demo 🝷 💑

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Cloud Demo gonitro.demo@gmail.com

Getting Started in Nitro Pro

- 1. Click the **Sign Up** link menu in the top-right hand corner of Nitro Pro
- 2. At the bottom of the dialog, click the **Log In** link
- 3. Enter your email address and password and click Log In



Additional Information

When signed into Nitro Cloud in Nitro Pro, you can easily upload and start workflows with documents you are working on using the **Share** tab.

Saving to Nitro Cloud

Logging into Nitro Cloud through Nitro Pro gives you the added benefit of taking your workflow outside of your desktop, utilitizing the services Nitro Cloud offers

How to save to Nitro Cloud

- 1. Ensure that you are logged into Nitro Cloud, then **Open** a PDF file in Nitro Pro
- 2. Click on the File menu and choose Save-As
- 3. Select the top option Nitro Cloud, then click Save
- 4. Once uploaded, you can open Nitro Cloud in the browser by clicking the Open Nitro Cloud button



Did you know?

The Nitro Cloud slider will appear on the right side of the window whenever you call a Nitro Cloud function. This not only provides a status of the action, but gives you the next step to finish your workflow.





GETTING STARTED: Request a Signature in Nitro Pro

Using Nitro Cloud within Nitro Pro enables others to easily sign your document

Requesting a Signature

- 1. Ensure that you are logged into Nitro Cloud and **Open** the PDF in Nitro Pro
- In the Share tab, click Request Signature. The Nitro Cloud drawer will open on the right and your PDF will begin uploading.
- A browser should open automatically to take you to your Nitro Cloud dashboard, if not you can click the Open Nitro Cloud button to launch your default browser
- 4. Follow the instructions for **Requesting a Signature** to complete the workflow

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GETTING STARTED: Share from Nitro Pro

Share PDF files using Nitro Cloud to enable others to easily view your document.



Share a document from Nitro Pro

- 1. Ensure that you are logged into Nitro Cloud and **Open** the PDF in Nitro Pro (refer to page 8)
- In the Share tab, click Share. The Nitro Cloud drawer will open on the right and your PDF will begin uploading.
- 3. Enter the recipients email address and customize the subject and message
- 4. Click the **Share** button to share the document

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		5	\$7,279,866	\$0	\$5,491,790	\$0	\$3,703,715	\$0	Mossago		
		6	\$8,020,109	\$0	\$6,078,880	\$0	\$4,137,650	\$0	wiessage		
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		27	\$35,783,093	\$0	\$28,097,798	\$0	\$20,412,503	\$0	No one outside of the recipients will		
		28	\$37,948,498	\$0	\$29,815,188	\$0	\$21,681,878	\$0	have access to the document.		
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