

# 1. Dashboard

After login, the user lands on the **Dashboard**.

**Primary Action:**

- **Upload Document**

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# 2. Upload Document

The user begins the process by selecting **Upload Document**.

**Supported File Types:**

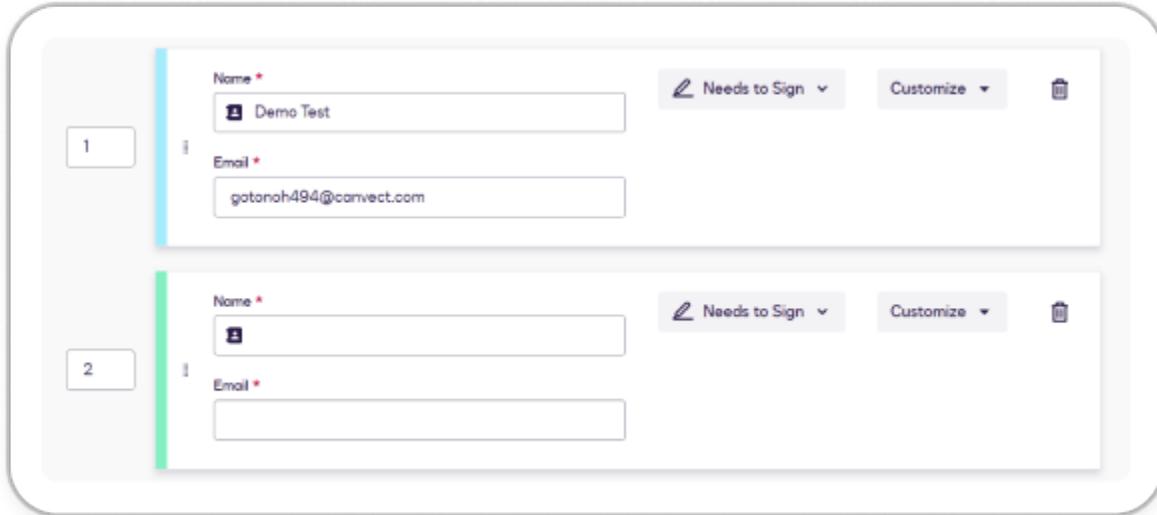
- PDF
- DOCX
- PNG
- JPG

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Once the document is successfully uploaded, the user proceeds to the signing mode selection.

## **Multi-Signer Workflow (Send to Multiple Signers)**

### **3. Add Signers Setup**



The screenshot shows the 'Add Signers' interface. It displays two signers, each with a numbered box (1 and 2) and a vertical color-coded bar (blue for signer 1, green for signer 2). Each signer has fields for 'Name' and 'Email', both marked with a red asterisk indicating required fields. The 'Name' field for signer 1 contains 'Demo Test' and the 'Email' field contains 'gotonoh494@convekt.com'. The 'Name' field for signer 2 is empty. Each signer row includes a 'Needs to Sign' dropdown menu, a 'Customize' dropdown menu, and a delete icon.

After selecting **Send for Signatures**, the user enters the **Add Signers** screen.

#### **Information Required for Each Signer**

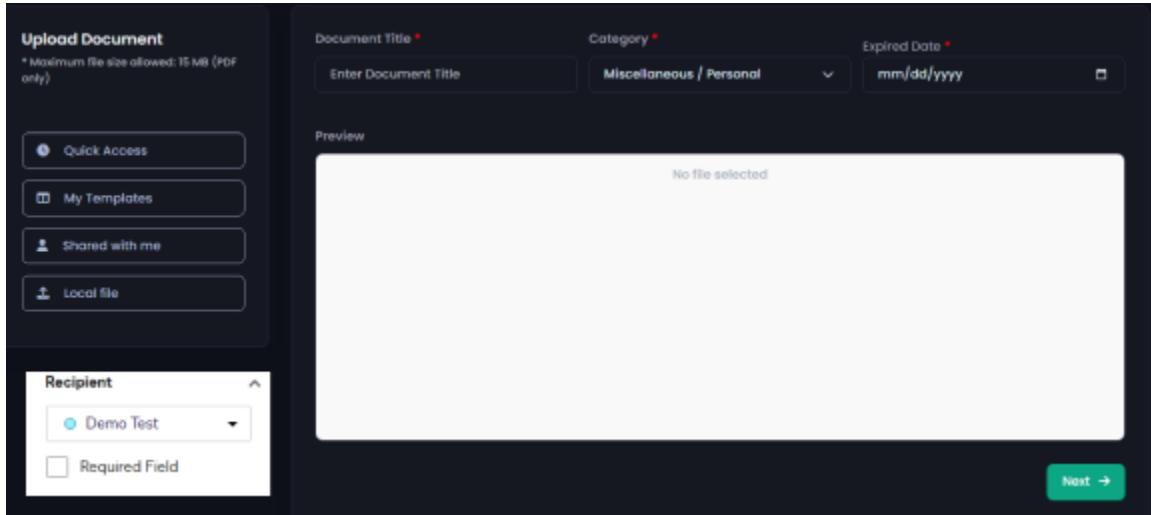
- **Full Name**
- **Email Address**
- **Role:**
  - Needs to Sign
  - View Only
  - Receives Copy (CC)

#### **Additional Capabilities**

- Add **unlimited** signers
- Choose **Signing Mode: Order / Inorder**
  - **Order:** One-by-one signing
  - **Inorder:** All signers receive the document at the same time

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## 4. Document Editor



The screenshot shows the Document Editor interface. The left panel includes fields for 'Upload Document' (maximum file size 15 MB, PDF only), 'Quick Access' (Quick Access, My Templates, Shared with me, Local file), and a 'Recipient' dropdown set to 'Demo Test'. The right panel features 'Document Title' (Enter Document Title), 'Category' (Miscellaneous / Personal), 'Expired Date' (mm/dd/yyyy), and a 'Preview' section that says 'No file selected'. A 'Next →' button is located at the bottom right of the right panel.

Same two-panel layout as self-signing, but with **signer assignment features**.

### Left Panel

- Real-time Document Preview

### Right Panel

- E-Sign Tool
- Stamp Tool
- Date Tool

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#### 1) E-Sign Tool

Signature options:

- Initials
- Full Name Signature

Input methods:

- **Text:** Type name → auto-generated signature style
- **Draw:** Create signature via mouse/touch
- **Upload:** Upload an existing signature file (PNG recommended)

The user places the signature via **drag & drop**.

#### 2) Stamp Tool

- Upload stamp image (PNG/JPG)
- **Drag & drop** onto the document

### 3) Date Tool

- **Auto-Fill:** Inserts today's date
- **Manual:** Calendar selector
- Can be placed using **drag & drop**

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## Signer Assignment Logic

Every placed field must be assigned to a specific signer.

#### Color Coding Example:

- Signer 1 → Blue
- Signer 2 → Yellow
- Signer 3 → Green
- (Additional signers get unique colors)

#### Purpose:

- Only the assigned signer can fill, sign, or complete that field
- Sender clearly sees which signer is responsible for each action

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## Two-Step Placement Process

1. Place the field (drag & drop)
2. Assign it to a signer

**Rule:** System can ensure each signer has at least one required action.

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## 5. Review & Send

Final review screen displays:

- Document preview
- List of signers
- Signing order Order/Inorder
- Custom email message
- Optional reminder settings

User clicks **Send for Signature**.

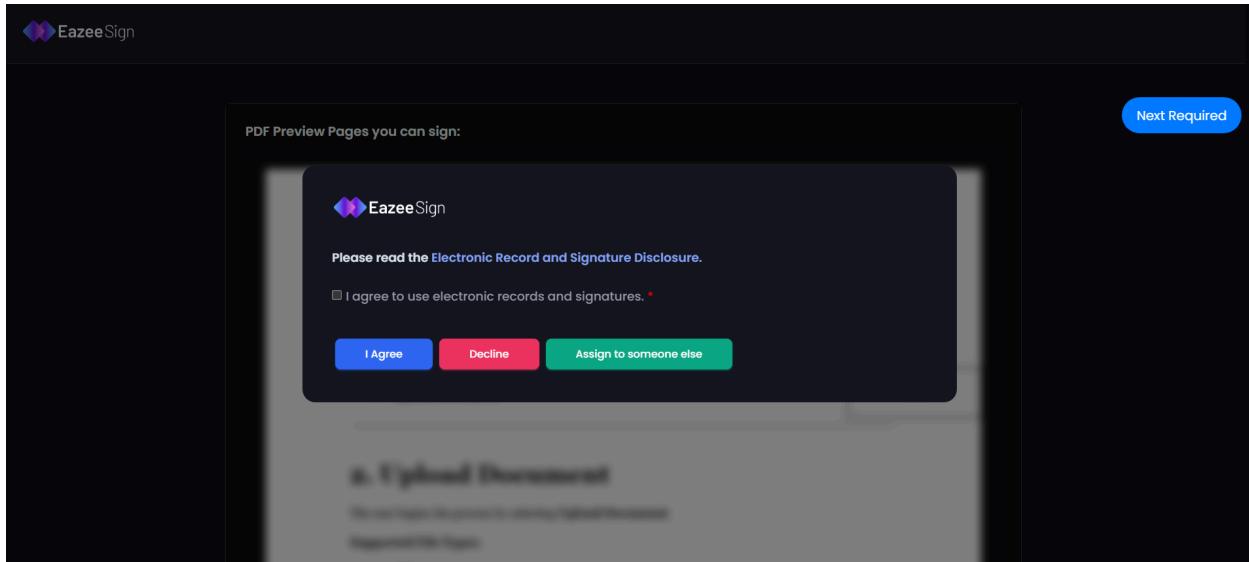
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## 6. Signer Experience (External Flow)

Each signer receives:

- Email notification
- Secure access link

When a signer opens the link, 3 options appear:



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### a) I Agree

Opens the document editor with:

- Only assigned fields visible
- Available tools (Signature, Stamp, Date) based on assigned tasks
- Start button highlights the first required action
- Automatic navigation to the next required action

After completing all actions → signer clicks Finish.

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### b) Decline

- Signing stops for that signer
- All participants receive a notification

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### c) Assign to Someone Else

- Signer can forward responsibility
- New signer receives a secure link
- Sender is notified

Upload Document  
\* Maximum file size allowed: 15 MB (PDF only)

Document Title \* Category \* Expired Date \*

Enter Document Title Miscellaneous / Personal mm/dd/yyyy

Preview  
No file selected

Quick Access  
My Templates  
Shared with me  
Local file

Required Field

Next →

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## 7. Completion

After all required signers finish:

System generates:

- Final signed PDF
- Execution certificate
- Audit trail

All participants receive the completed document.

Dashboard updates status to **Completed**.

# **System Behaviours & Policies**

## **SYSTEM RULES & POLICY LOGIC (Applies to Entire Workflow)**

### **1. Rejection / Decline**

- Workflow immediately stops
- Document state → Declined
- Document becomes read-only/locked
- Sender notified
- Remaining signers informed

### **2. Invalid Signature Handling**

- System(sender,signers) flags incorrect/invalid signatures
- Signer must redo before progress
- Cannot proceed until fixed

### **3. Timeout Policy**

- Auto-decline after X days (configurable)
- Sender receives timeout notification

### **4. Visibility Controls**

- Each signer sees only their assigned fields
- No visibility into other signers' actions, emails, or roles

### **5. Completion Logic**

- All required fields must be completed
- System marks workflow as Completed
- Final signed PDF
- All participants notified

## **6. Post-Send Editing Rules**

- Once document is “Sent for Signature” “Signature is done” → editing disabled
- Any changes require starting a new workflow

## **7. Multi-File Workflow Coordination**

- If multiple files are part of a package
- Workflow completes only when all files are signed