

Creation and follow-up of workflows

Nicolas ARBOUIN - 2025-09-15 - [Use your platform](#)

Creation and follow-up of workflows

Send validation requests, be more productive and more safe.

Note : Workflows are available from 2k19 offers. If you don't have access to it, ask your administrators.

What are workflows ?

Workflows allow internal validation or signature by affixing a stamp on documents. This feature fixes in dematerialization and facilitates your daily tasks, whether they are personal, commercial or official.

A workflow, as its name says, is like the flow of water, it goes from people to another, in the way signatories have been put :

It goes like that : Creatot > signatory 1 > signatory 2 > signatory 3

Thus signatory 2 won't receive demande as long as the signatory 1 won't have signed the document



You can easily create a demand in a few clicks :

- simple validation (1 file), for every kind of files
- multiple validation (several files), for every kind of files
- digital signature, only on PDF files
- certified digital signature (eIDAS : simple or advanced), only on PDF files

eIDAS signature will ask for SMS confirmation, advanced eIDAS will also need a copy of european ID, Passport or residence permit.

Create workflows

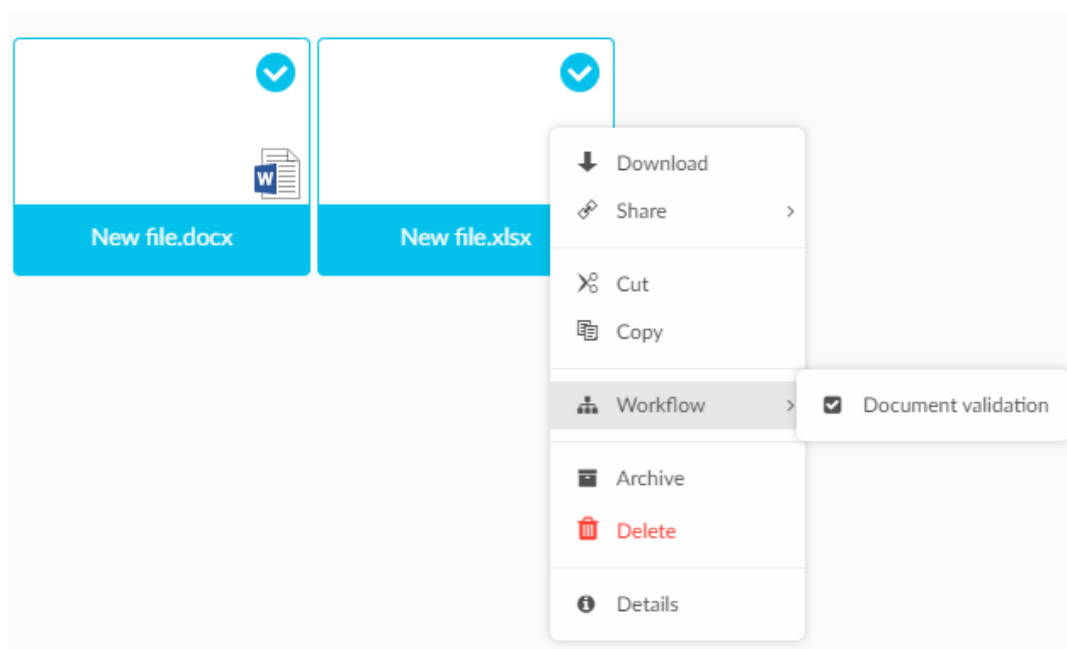
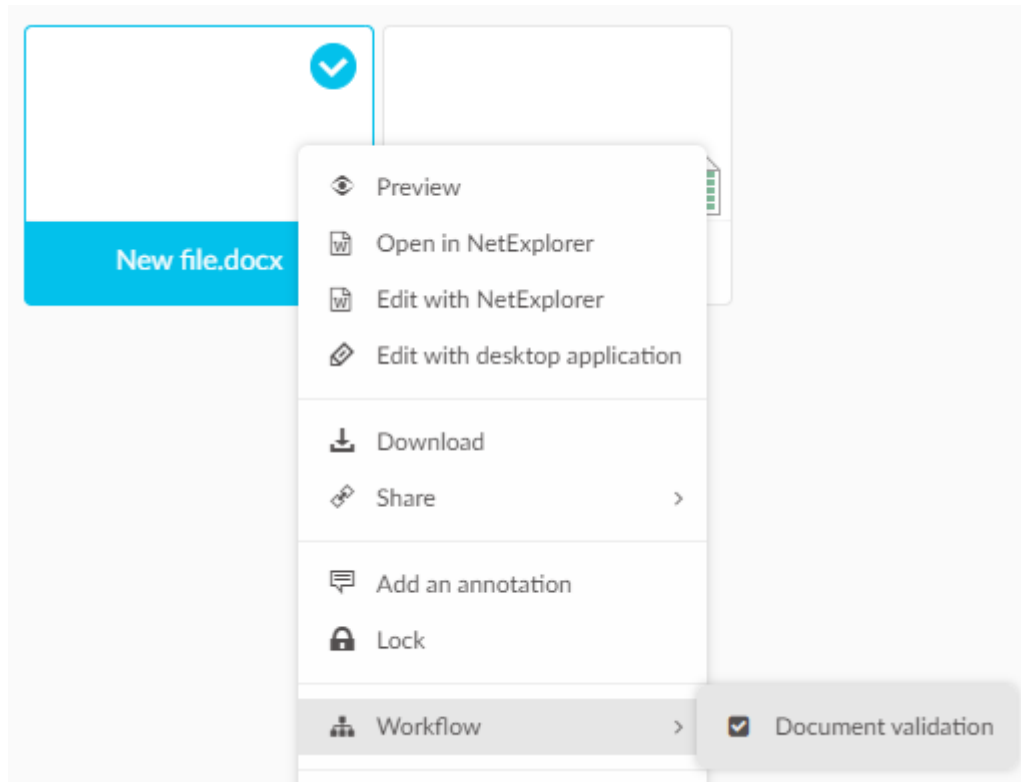
There are 2 main kinds of flows : validations and signatures which have a frame to receive a signature that can be drawn with mouse or pad, or a picture file signature you will be offered to add.

See more details on the page [Validate and sign workflows](#)

1. Simple or multiple validation

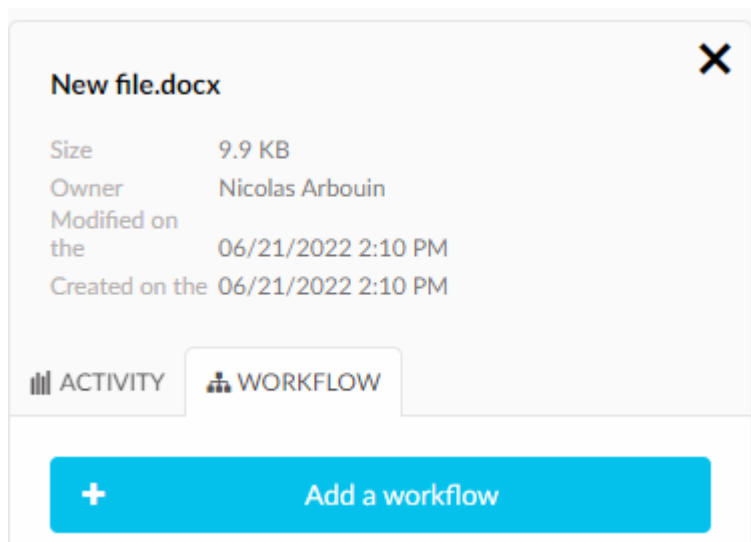
Choose a file, right-click on it and select "Workflow", then choose between the different types of flow according to your needs.

For validation, select one or more files to send it to signatory.

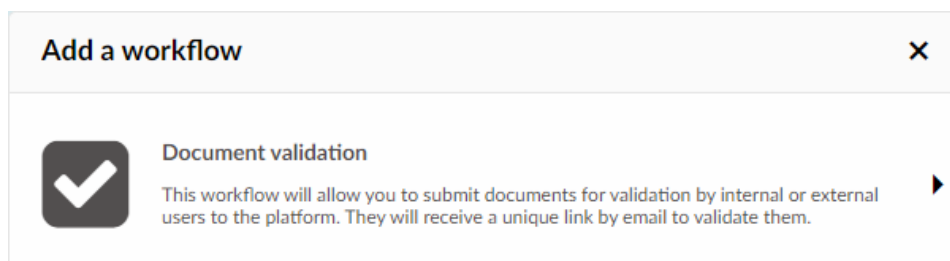


or

- Spot your file and right-click, then select "**Details**".
- Workflow's tab allows you to add a workflow or validation on your file.



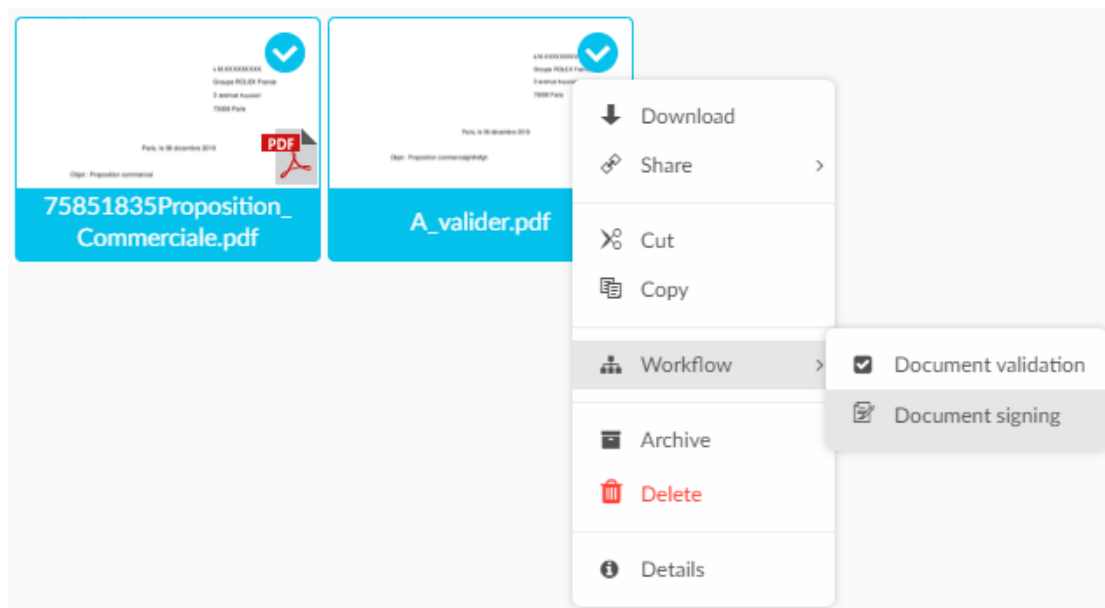
THEN



2. Simple or multiple eIDAS(signature collection)

For a digital signature, process gathers some more steps, and you can send one or more files.

Select PDF file(s) then right-click and select "Workflow", then click "Document signature".



then

Document signing

List of documents to sign

PDF

75851835Proposition_Commerciale.pdf

928.6 KB

PDF

A_valider.pdf

1.0 MB

Drag and drop here to add documents

Maximum authorized size for the signature envelope: 2.0 MB / 15 Mb

Previous

Next

If you need to add more documents, you can add them from this step, with a limit of 15Mo for the whole pack.

Preview

75851835-Proposition-Commer...

Document signing

List of documents to sign

PDF

75851835Proposition_Commerciale.pdf

928.6 KB

PDF

A_valider.pdf

1.0 MB

Drag and drop here to add documents

Maximum authorized size for the signature envelope: 2.0 MB / 15 Mb


Previous

Next

Then choose if you wish to sign or to send documents for signature.


Signature type

☐ I sign the document



☒ I send the document for signature

You can take part in the signing



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Next →

Select the type of signature : digital, eIDAS...


Signature type

☒ Digitized handwritten signature

Fast: validation by email

Compliance: NetExplorer evidence and timestamping

Internal notes, quotes, non-binding documents, everyday documents




☐ Electronic signature via trusted third party (eIDAS simple)

In 2 steps: validation by email + sending of SMS code

Compliance: simple eIDAS

Contracts, work contracts, sensitive documents

Available credits : 1




☐ Electronic signature via trusted third party (eIDAS advanced)

In 3 steps: validation by email + sending of SMS code + identity verification

Compliance: advanced eIDAS

Very sensitive documents requiring verification of the identity of the signatory

Available credits : 1



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Next →

2.1 Select recipients


Use either login for an existing user, or email address for an external workmate, then add her/him


Choice of signatories ✕

Digitized handwritten signature

The signatories will receive by email a link allowing them to sign the document.

Add recipients

jack-simmons@icloud.com 

 jack-simmons@icloud.com

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You can have more than a single user :


Choice of signatories ✕

Digitized handwritten signature

The signatories will receive by email a link allowing them to sign the document.

Add recipients

jack-simmons@icloud.com ✕ jim_jones@gmail.com ✕

Enter a name or an email address 

[Add me as a signer](#)

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2.2 Digital or eIDAS signature : stamp location

Click the green button to determine signature location

Position the signatures →

Then select the type of stamp you need (simple or text) and drag'n'drop from the stamp to the location on document (maintain click on stamp and drop it on page).

List of signatures to be placed

Position signatures via drag & drop

one signature

one signature

Signature and text

Configuring Signature Stamps

List of documents to sign

75851835-Proposition-Com...

donnees personnelles nominatives ainsi que du droit de demander leur suppression, conformément à la Loi n° 78-17 du 6 janvier 1978 relative à l'informatique, aux fichiers et aux libertés. La société s'engage à s'assurer que les données personnelles nominatives du client sont à jour, exactes et complètes. Le client peut exercer son droit d'accès ou de correction en contactant la société.

- par courrier à l'adresse suivante : XXXXXXXXXX, 4 rue du parc, 75002 Paris, France,
- par e-mail à l'adresse suivante : webmaster@emphactory.fr

Article 21. Force majeure / Cas fortuit

Est un cas de force majeure ou un cas fortuit tout événement extérieur, imprévisible et insaisissable au sens de l'article 1148 du Code civil, indépendant de la volonté de la société et faisant obstacle à la réalisation des services vendus, notamment les actes de puissance publique, les hostilités, les guerres, les émeutes, les faits du prince, les catastrophes naturelles, les incendies, les inondations, les intempéries exceptionnelles, les grèves totales ou partielles entravant la bonne marche de la société ou celle de l'un de ses fournisseurs, sous-traitants ou transporteurs ainsi que les avaries, les défaillances ou les retards d'un ou plusieurs prestataires, le blocage des télécommunications, le blocage d'internet, la panne du matériel diffusant le service, l'interruption des transports, de la fourniture d'énergie, de matières premières...

La partie déclarant invoquer un événement de force majeure devra notifier immédiatement à l'autre partie le commencement et la fin de cet événement, sans quoi elle ne pourra être déchargée de sa responsabilité.

Article 22. Juridiction compétente / Droit applicable

Pour toutes contestations relatives aux ventes réalisées par la société et en vue de l'application ou de l'interprétation des présentes conditions générales de vente, et à défaut de résolution amiable, seul est compétent le tribunal de commerce de Paris.

Le droit français est seul applicable.

List of signatures to be placed

Position signatures via drag & drop

one signature

jack-simmons@cloud.com

jack-simmons@cloud.com

jack-simmons@cloud.com

25 / 25

Previous Confirm

If you selected several documents for a signature collection, you will get this preview, in which you can see the list of documents on the left row.

Configuring Signature Stamps

List of documents to sign

75851835-Proposition-Com...

A_validator.pdf

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List of signatures to be placed

Position signatures via drag & drop

one signature

jack-simmons@cloud.com

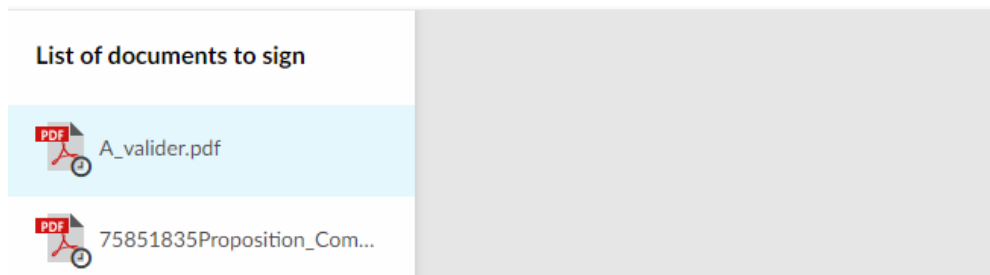
jen_jones@mail.com

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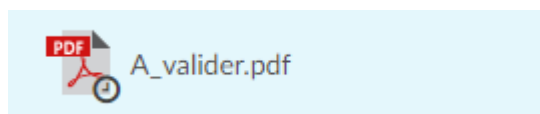
Previous Confirm

You will have to position stamps on every document of your collection.

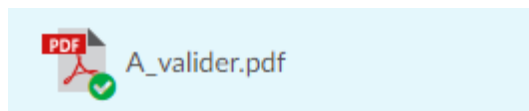
We added reminder tags so you don't forget any document. Those tags indicate if stamps are correctly added on each document.



The "clock" tag indicates that the document is waiting to be placed over the document.



The green "tick" indicates that the stamp is rightfully added, which means that the document is correctly setup and contains all of the stamps needed (at least one for each signatory).



ONE stamp by document is enough, a digital signature doesn't need initials on each page of document.

Then, click on "Validate" to finalize sending.

2.3 Send invitation to recipients

Once users are chosen, just click "Confirm"

Confirm ✓

You will get a summary of users who will receive an email with a link for validation of document. You can also add a comment.

Add a workflow

×

Digitized handwritten signature

The following users will receive an email to sign your document.

Comments (optional)

@

jack-simmons@icloud.com

@

jim_jones@gmail.com

Preview of the email sent

← Previous

Send for signature ✓

Then you can get a preview before sending,

And finally click on

Send for signature ✓

Principle of flow and following of flow

First signatory of the list will get an email (see example below) inviting her/him to sign document.



Several documents are awaiting signature

Hello ,

Nicolas Arbouin has invited you to sign the documents below.



75851835-Proposition-Commerciale.pdf (4.79 Mo)



A_valider.pdf (1.05 Mo)

To access the documents, click on the button below.

OPEN

To find your files

Platform address :

Signatories will receive invitation to sign or validate, according to the order you added them when creating the flow.

So, firms in the list will have to sign for the email to be sent to the next signatory, and so on.

If you are one of signatories, you can find tutorial for signature on this page [Validate and sign workflows](#)

Edge case

If you check the box "receive a copy", you will receive an email indicating that the signed document is available.



Documents you have signed are available for download

Hello,
You will find attached a sharing link allowing you to access the documents you have signed recently.

To access the documents, click on the button below.

OPEN

To find your files

Platform address :

tip : keep the address in your favorites or on your desktop.

- Tags
- [document](#)
- [documents](#)
- [eidas](#)
- [email](#)
- [flux](#)
- [recevoir](#)
- [signature](#)
- [signatures](#)
- [signer](#)
- [validation](#)
- [valider](#)