

Validate and sign workflows

Nicolas ARBOUIN - 2023-12-27 - Validate and sign your documents

Validate and sign flows started by a workmate

You're about to validate a document (signature or validation) that one of your workmate sent you. What is the process ?

I got an email for validation of document, what should I do ?

You just got an email like this one :



A document is awaiting validation

Hello ,

Nicolas Arbouin wants you to validate the document **New file.docx**.

To access the document, click on the button below.

OPEN

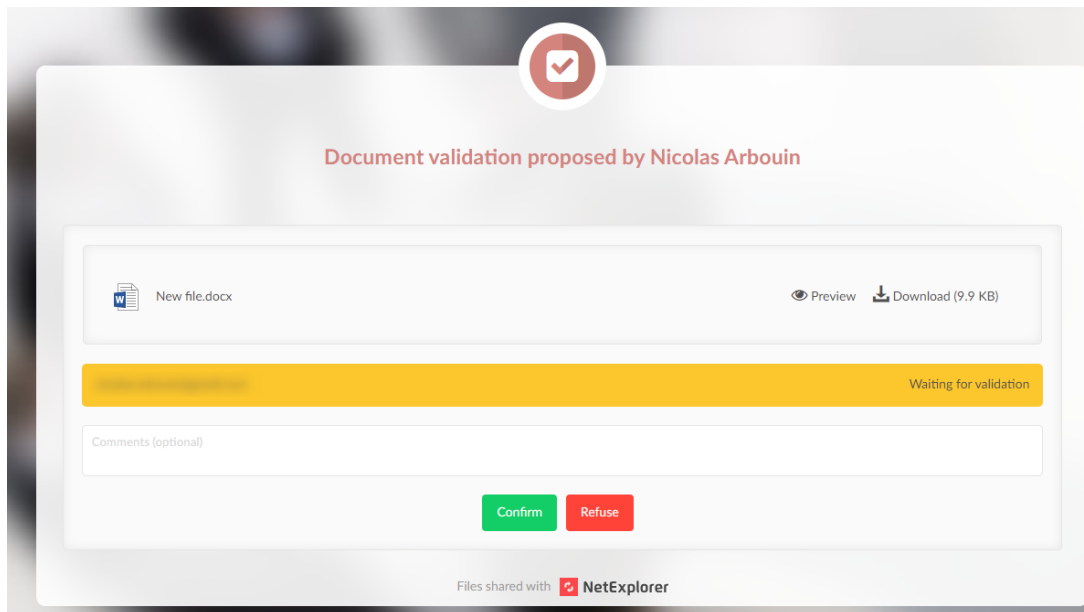
To find your files

Platform address :

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

Click the "display" button and you will be redirected to a page asking you to accept or deny validation of document.

You will also be able to preview document.

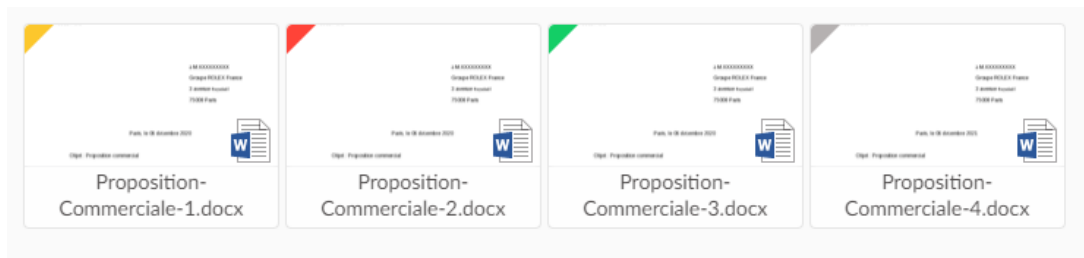


How to check if my document has been validated ?

When a validation flow is created, a yellow tag appears on the corner of icon. This indicates the document has not been rated yet by signatories.

Once signatories or workmates have answered, the tag becomes green if accepted or red if denied, in both cases the flow comes at an end. You will then get a summary by email.

Finally, a grey tag indicates that the file has changed since the end of the flow, and so the latest version is not the validated one.



You can also check the state in the "WORKFLOW" tab.

Proposition-Commerciale.docx

Size

2.7 MB

Owner

Nicolas_User

Modified on the

06/20/2022 10:58 AM

Created on the

06/20/2022 10:58 AM

ACTIVITY

WORKFLOW

+

Add a workflow



Document validation

by : Nicolas Arbouin

@

Waiting for validation

Notes

- Workflows are linked to a single file version.
- To delete a workflow, you have to go to the /Details menu in the workflow tab and click 
 - A workflow can be deleted only if it has reached its end, or if the file has been deleted too.
- To see all of the flows you're working on, select from the left row the icon  My workflows
- When a validation is over, you will get a summary by email.

Multiple validation

It is the same than simple validation, but you can add a great number of documents in the same operation, either to internal or external users.

How does it happen from the signatory point of view ?

Signatories will receive an email like this one :

Document signing proposed by Nicolas Arbouin

You are about to sign as . Read the documents, accept the conditions at the bottom of the page, then sign.

Awaiting signature

A_valider.pdf

Document 1 / 1



OCTOPUS

Société OCTOPUS
100, rue d'Aboukir
75002 Paris

Signatories can sign in 2 different ways :

- Draw a signature with mouse or pad

ACCEPT THE DOCUMENT

☒ I have read and accept the document above

Draw a signature

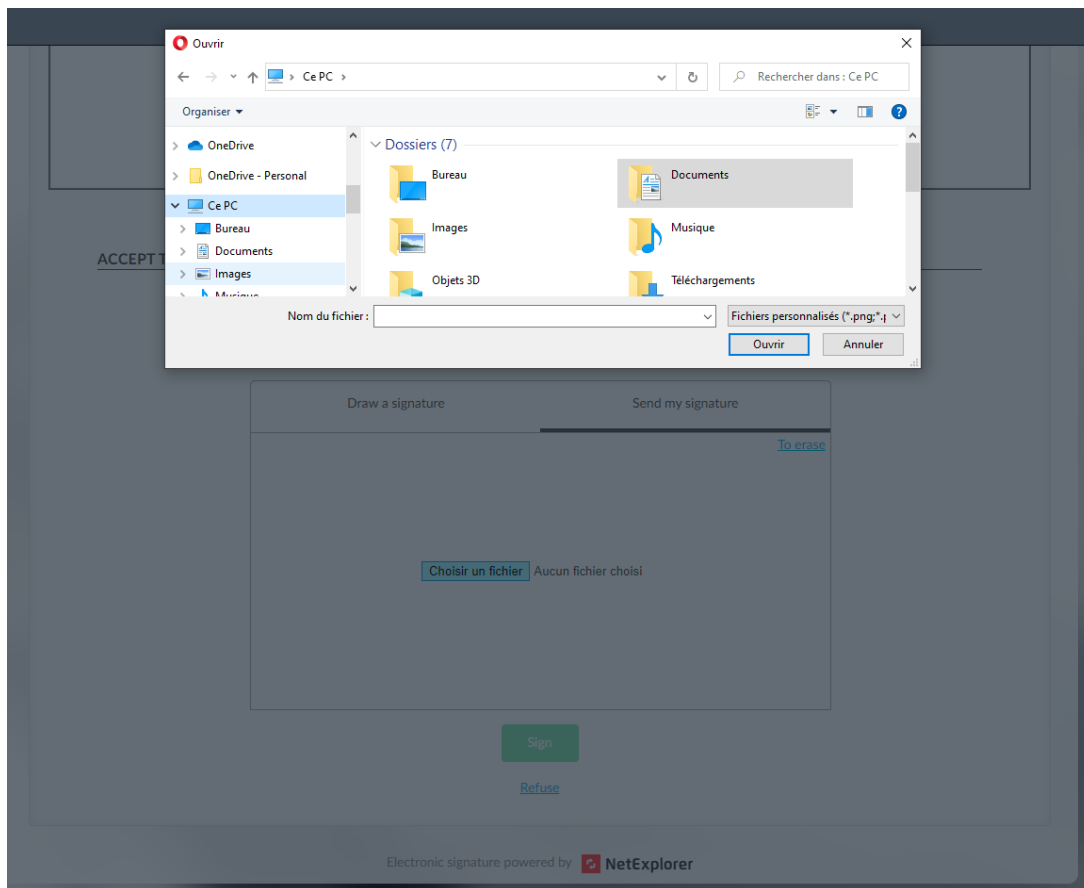
Send my signature

[To erase](#)

Sign

[Refuse](#)

- Load graphic file of their signature



Every signatory will get a notification by email, warning them with link and expiration date for signature.



A document is awaiting signature

Hello ,

Nicolas Arbouin Has invited you to sign the document **A_valider.pdf**.

Please note that this link will expire in 14 day(s).

To access the document, click on the button below.

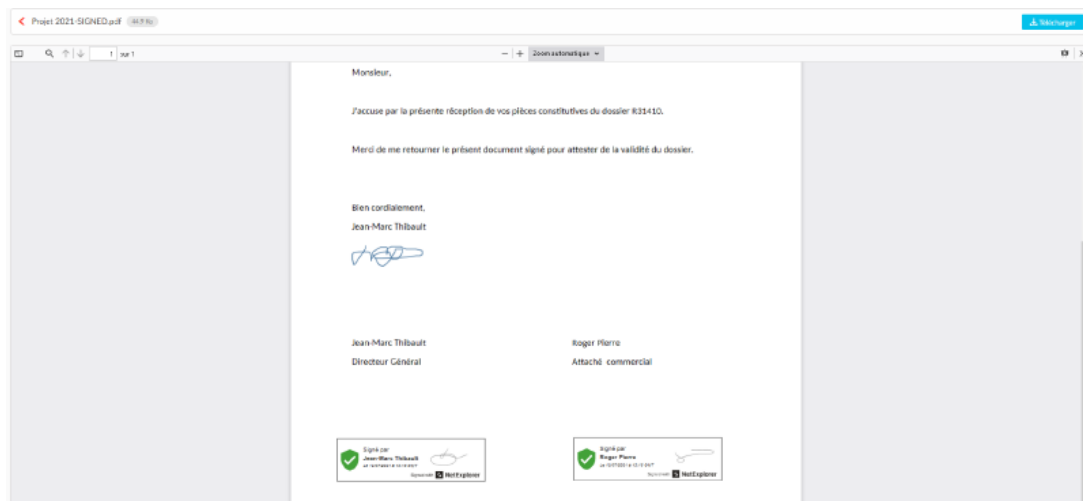
OPEN

To find your files

Platform address :

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

Signatories will be able to sign the document, once signature is done, it will look like this :



If you have a look at the files to be signed, they can like this :



file is waiting for signature



signature has been refused



signature has been accepted

In case of refuse, recipient can leave you a message for explanation.

A_valider.pdf

Size1.0 MB

OwnerNicolas Arbouin

Modified on the06/21/2022 12:33 PM

Created on the06/21/2022 12:33 PM

ACTIVITY

WORKFLOW

+

Add a workflow

Digitized handwritten signature

by : Nicolas Arbouin

@

Refused

NO !

Signatories will have access to the signed document.



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.

Once signature has been done, document will change its status, you will be warned of it.



Your workflow has changed status

Hello Nicolas Arbouin,

Your digitized handwritten signature workflow has transitioned to status Refuse.

Further informations :

Refused by :

Reminder : this workflow is in place on **A_valider.pdf**.

To open this workflow, click the button below.

OPEN

If your emails software does not allow you to click on the button above, you can also copy the following address into your browser :

Then

Document signing proposed by Nicolas Arbouin

@gmail.com

Signed

Finally, you will be able to see that the document has been signed by every signatory.

A_valider-SIGNED.pdf

Size1.2 MB

OwnerNicolas Arbouin

Modified on the06/21/2022 12:33 PM

Created on the06/21/2022 12:33 PM


ACTIVITY

WORKFLOW

Include: All

VERSION 1

1001



Digitized handwritten signature

Signed

Tags

document

documents

email

recevoir

signature

signer

validation

valider