1. Dashboard

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

Primary Action:

- **Upload Document**

---

2. Upload Document

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

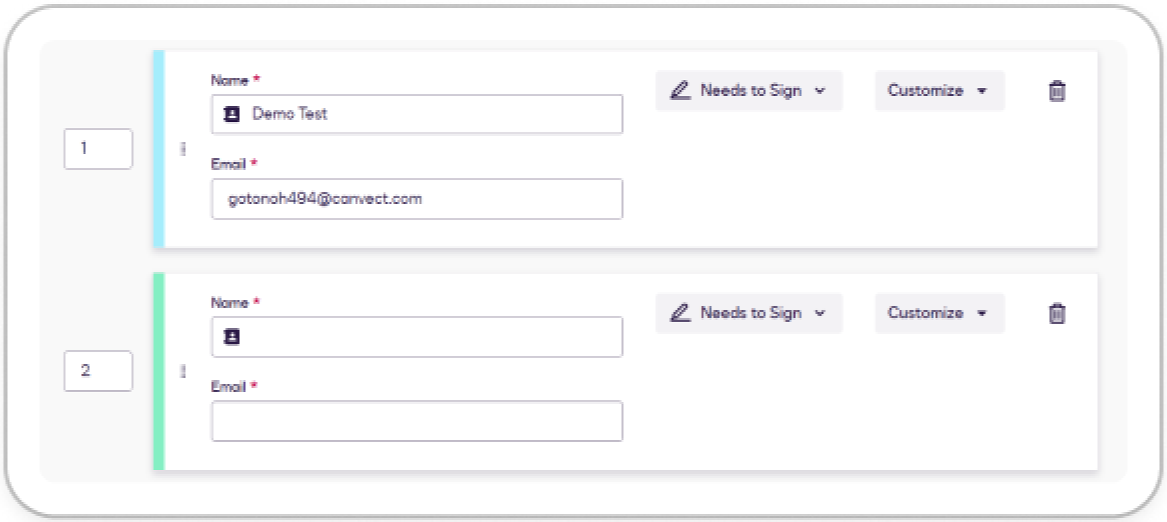
Supported File Types:

- PDF
- DOCX
- PNG
- JPG

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



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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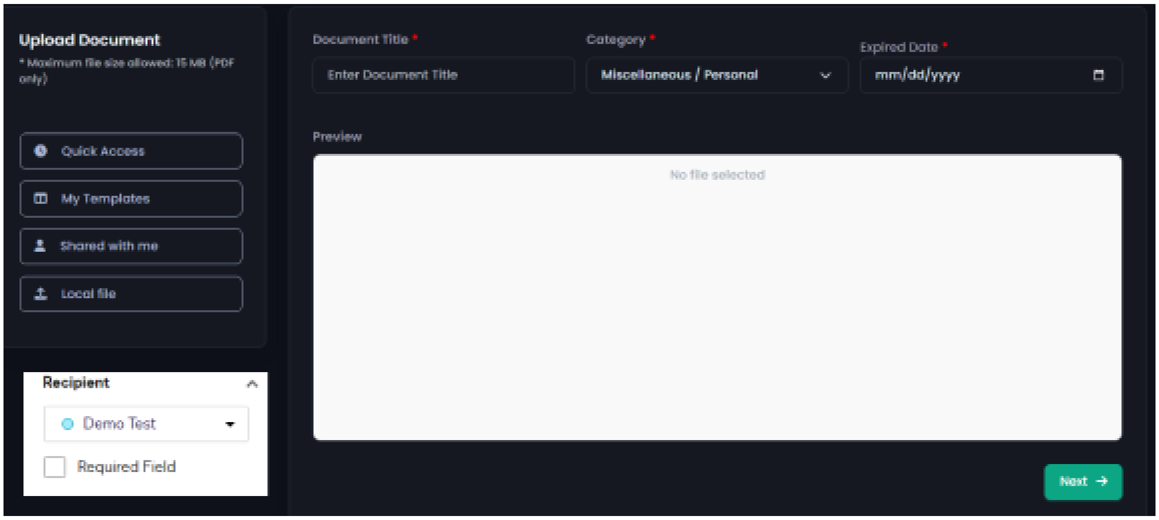
4. Document Editor



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**

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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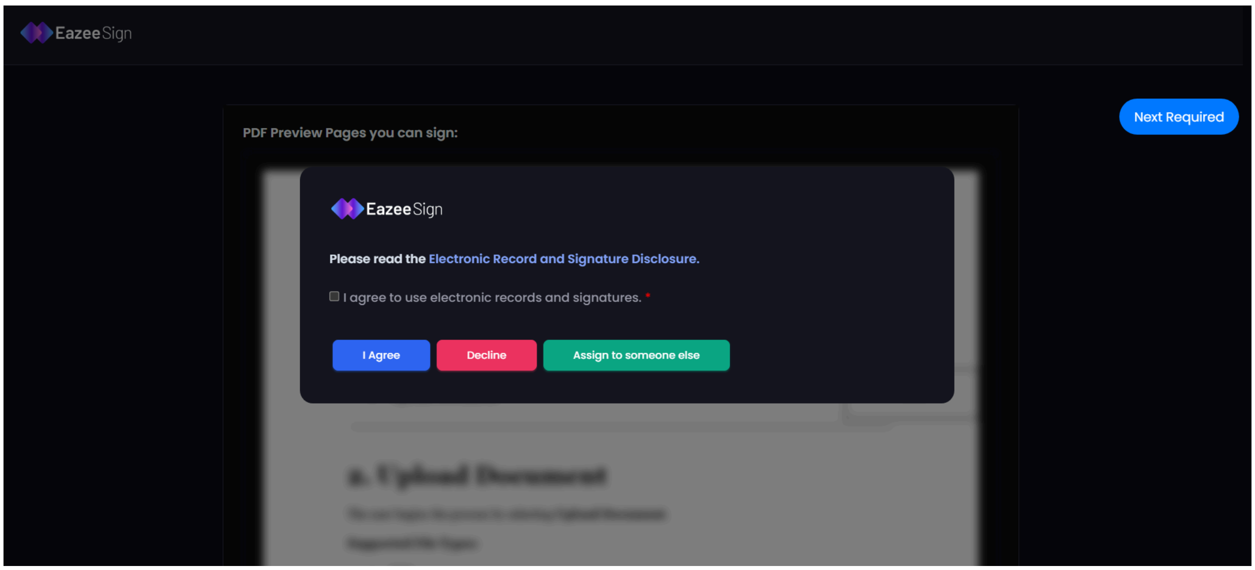
6. Signer Experience (External Flow)

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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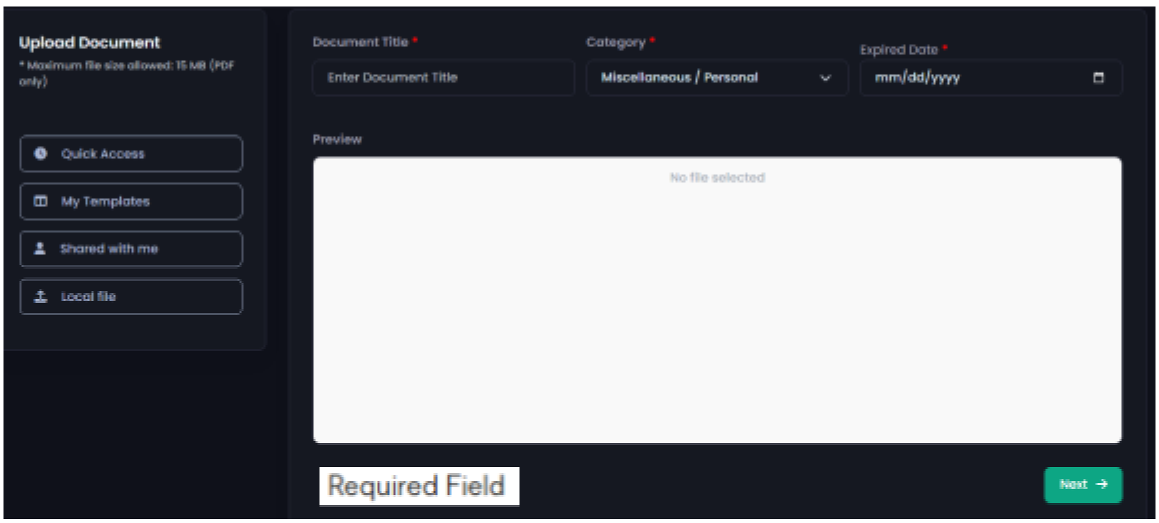
b) Decline

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

---

c) Assign to Someone Else

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



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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