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.

---

3. Select Signing Mode

The user chooses between:

A. Myself

The user signs the document individually.

B. Me With Others

User signs the document and adds additional signers.

A. SELF-SIGNING FLOW (Myself)

4. Self-Signing Start

Selecting **Myself** takes the user directly to the **Document Editor**.

---

5. Document Editor (Self-Signing Version)

A structured two-panel interface:

Left Panel

- Live **Document Preview**

Right Panel – Tools Panel

Includes three key tools:

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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

Options:

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

---

6. Placement & Editing

All elements placed on the document can be edited:

- Move
- Resize
- Delete
- Change style (text-based signatures)

---

7. Preview & Confirmation

User selects **Preview Document** to view a full-screen preview of the finalized document.
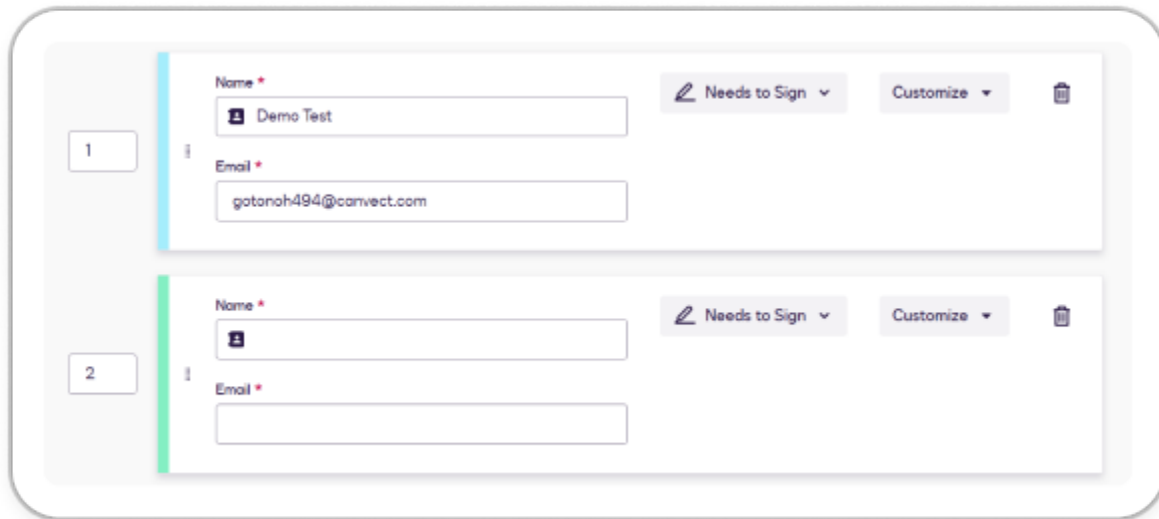
---

8. Completion & Export

Final action options:

- **Download Signed PDF**
- **Send via Email** (optional)
- **Save to My Documents**

B. MULTI-SIGNER WORKFLOW (Me With Others)

4. Add Signers Setup

After selecting **Me With Others**, the user enters the **Add Signers** screen.

Each signer requires:

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

Additional capabilities:

- Add unlimited signers
- Set signing order (Sequential)
- Choose signing mode:
  - **Parallel Signing:** All signers receive the document simultaneously
  - **Sequential Signing:** Signers receive the document one after another

---

5. Document Editor

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

Left Panel:

- Real-time Document Preview

Right Panel:

- Tools Panel (same tools as self-signing, plus signer assignment)

---

6. Multi-Signer Field Tools

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**

Additional Tools

  - Text input fields
  - Checkboxes

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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8. Review & Send

Final review screen displays:

- Document preview
- List of signers
- Signing order (Sequential / Parallel)
- Custom email message
- Optional reminder settings

User clicks **Send for Signature**.

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9. Signer Experience (External Flow)

Each signer receives:

- Email notification
- Secure access link

When opening the document:

- Only assigned fields are visible
- **Start** button highlights the first action then next action
- Signer completes actions → clicks **Finish**

Sequential Mode: The next signer receives the document only after the previous signer finishes.

---

10. 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