

# 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

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

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## 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.

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# A. SELF-SIGNING FLOW (Myself)

## 4. Self-Signing Start

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

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## 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**.

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#### 2) Stamp Tool

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

Options:

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

All elements placed on the document can be edited:

- Move
  - Resize
  - Delete
  - Change style (text-based signatures)
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## 7. Preview & Confirmation

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

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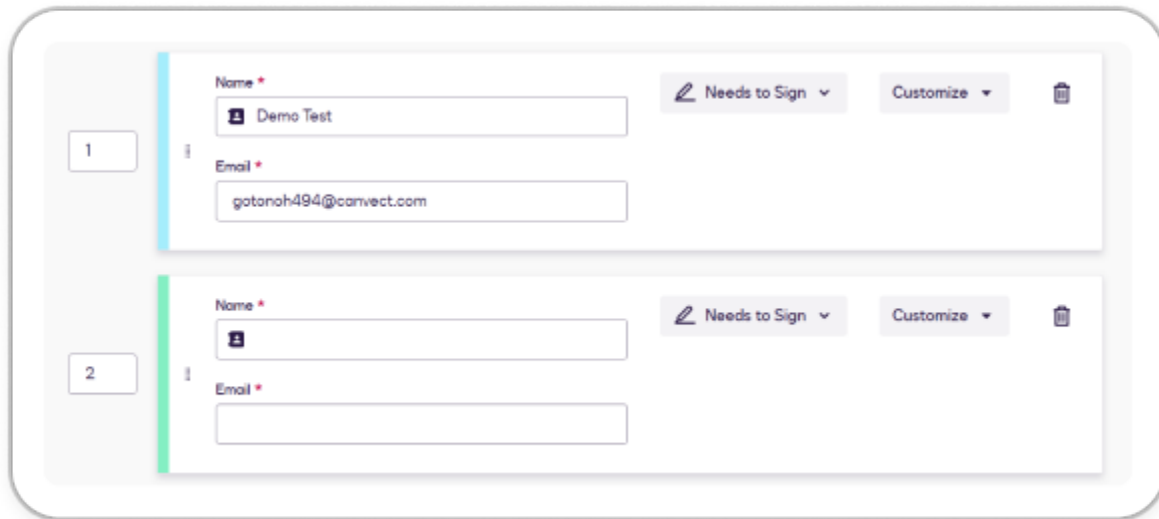
## 8. Completion & Export

Final action options:

- **Download Signed PDF**
  - **Send via Email** (optional)
  - **Save to My Documents**
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## **B. MULTI-SIGNER WORKFLOW (Me With Others)**

### **4. Add Signers Setup**



The screenshot displays the 'Add Signers Setup' interface within a rounded rectangular container. On the left, there is a vertical list of two numbered boxes: '1' and '2'. Box '1' is highlighted with a light blue vertical bar, and box '2' is highlighted with a light green vertical bar. Each box corresponds to a signer entry. The first entry (box 1) has a 'Name' field with a red asterisk, containing 'Demo Test', and an 'Email' field with a red asterisk, containing 'gotonoh494@carvect.com'. The second entry (box 2) has a 'Name' field with a red asterisk and an 'Email' field with a red asterisk, both currently empty. To the right of each entry, there is a 'Needs to Sign' dropdown menu with a pencil icon and a 'Customize' dropdown menu with a trash icon.

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

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### **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
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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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## 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.

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## 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