User manual







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User manual CLICK & Sign

Initial data collection

When entering for the first time to the Back Office, please provide the following:

Basic data

Company or contact name Company tax ID Languages

Language of the documentary evidence (the language of the PDF document that records the technical details and communications of the Click & Sign process)

Senders Name or mobile number of the SMS sender· Email sender

Brand image

Upload or drag your company logo Text colour Background colour "Sign" button text colour Button background colour Preview email Preview signature page

Initial set-up

Basic data

Hil To start with, we need a few pieces of information to create your first templates



Brand image

Add a logo, select corporate colours and check the final look and feel of the emails to be sent and the page from which the documents will be signed. If none is selected, the Click & Sign colours and logo will be used





Dashboard

Once the initial data collection is set up, the next screen you'll see is the "control panel".





Sending documents

Manually:

Enter the recipient's names, mobile numbers, and email addresses manually.

Using a CSV File: Bulk sending by uploading a CSV file with recipient data.



How to send Manually

ID of the sending





Select a template from the predefined options that best meets your needs.





Alternatively, you can create and customise a new template with the available features (details on this option will be provided later).

Search				Q Show	disabled templates	0 - 3 de 3 < >	+ New template
ID 🗸	NAME	TYPE OF SIGNATURE	COMPANY NAME	EXPIRATION TIME	LANGUAGE	ACTIONS	ACTIVATED
70686	Signature with SMS Code	One time password (OTP)	demo	30 days	English	Q 🖲 <>	
70685	Signature with Digital Certificate	Digital certificate	demo	30 days	English	Q 🖲 🚸 🕨	
70684	Biometric handwritten signature	Biometric One time password (OTP)	demo	30 days	English	Q 🖲 🚸 🕨	

User manual CLICK & Sign

Step 1 Select the template.

For this example, we'll use a "Digital Certificate Signature."

ID of	the sending 9872176354	Select the template Sending is carried out with the parameters alre	eady configured				
1	Select template Select the template you want to use Upload documents Upload the PDFs to be signed	Biometric handwritten signature demo	(i)	Signature with Digital Certificate demo	ı	Signature with SMS Code	(i)
3	Signatories' documentation Request payslips, receipts, etc.						
4	Signatories' data Email, mobile, etc.						
5	Document editing Signature positioning and assignment of editable fields						
6	Finish Review and send						



Upload documents

Step 2 Add the document that your recipient needs to sign. Once uploaded, it will appear at the bottom.

Step 3 Documentation from the signatories

(optional) Request your signatory to upload documents such as pay slips, receipts, or any necessary documents.

You can request up to 10 documents from your recipient before signing Specify if you want to certify them. You can now add a document.

Signatories' documentation	
If you want signatories to upload specific documents, such as payalips or receipts, you can request up to a maximum of 10. G	ive an easy-to-remember name.
Name of document	I need to certify these documents
ID card	Mandatory
+ Add document	



Step 4 Configure the signatory's data.

If a recipient is not already in your **contact book**the system will display an icon to add them.

Single signatory: requires only one person's signature.

Parallel signing: documents are sent simultaneously and can be signed in any order.

Hierarchical signing: documents must be signed in a predetermined order, so the second level cannot sign until the first has done so. You can set the desired number of signatories at each level.

Note: Please note that the maximum number of signatures allowed on the same document is 20.

Contact details of the signatories

Enter all the necessary data to send the documents to the signatories

	-	 Optional for additional signat 	ories: 🚯 The signature pla	cement is now in the following stage
	Signatures required for the next level	· ·		Activate passcode for all signers
	Name and surname	Email	Identity document number	
	John Doe	john.doe@email.com		
		Add signatories from the address boo	ok + Add a new signatory	
0		You can save the contact to your contact book for future use.		
Add a nev Hierarchio	w signing level for cal signing		or add a new signatory for Parallel signing.	Available only for custom templates.

Step 5 Document Editing

Position signatures and assign editable fields.

If you uploaded a document with editable fields, you could edit them at this stage.

Documents		Document editing
= Invoice.pdf	Lorem (psum dolor sit amet, consecteur adipisoing elli: Present tiniduut negue quis ex matesuada, in formenzum applen consilis. Viamus laculi en ulla eccuman imperiate la oret: Aleman finction and and, si el formenzima di considera anna di considera el constructiona di considera anna di considerativa di considera anna di considera el construita ella di considera di considera anna di considera anna di consecteur. Il beno eres publicaria ella dictami pisum. Mosti violugat, seme ul violate consecteur. Il beno eres publicaria ella dictami pisum. Mosti violugat, seme su violate consecteur. Il beno enter publica ella dicta di constito eso tora e unico. Consect use di manto si viena moncue el di nun. Cresi sichia una tempa dalari considerativa nun quis non nais. Amere fixadosa esgue i quis anomosu, se hierariari historiano.	Select the signatory Test Person 1
	Nunc venenasti vestibulum nisi non tempus. Suppendisse a nunc lacina, alquam ligula imperviete, conveilis mass. Name gef inglia massa. Nulimi jet ini nistusu metisi, finitus velt molettis, semper sem. Anenan congue purus nec utiricite egeistas. Sod egei turujis lacinia, curusa lickas, a facilitis elimi. Proino nora utiricite massa vel mekauda.	Fields Drag the box to the
	Pelinensegue habitant moti's insigue serventus et netus et metus et metus et unups egestas Sel fectus (pour, o cogari vice regaris (nermentum accurant picum). Ut eget ori vitae nunc bibendum convalis. Dorer eur ingilie mates sit amet tempus dolor. Viviemus tempus congue portitori. Sed moliis melasuide arcu e usiamod. Proin on fingilia nihi, lachid abplus odio. Donee et mgari arcumen. Mauris accumsan melasuida bibendum. Fuze ene etimi westbuluum, maximus lacus vei, maximus justo. Verbulum et urupsi vate jeuno morte herbendir. Supervides posteri. Curabitor eu	Signature <i>Test Person 1</i>
	ubricles quant, ac congue ex. Wiamus gets prund et mi egettat maximus lid consequat tortor. Mearis Werter teampa dolor, vite en charunt figue fandicunt ez. Ut solicitudin megne nec odio eutomod placents. Sed ut vehicula lacus. Curabitur vites dui non ipsum portato sodales sed a lettus. Moroi luctus, uma at sodale facilisis, neque ex somer jutos, at consceture min mujoi nois. Morbi nunc	Where it Or least results Or least re
	purus, vierra at purus ut, idooris tempor nisi. Viennus idooris arcu at amet justo pulviner placerers. Nuis felis libero, portosi si amet aliquav huke, congue in masa. Suspendise potenti. Maecense hendrerit: congue mauris vulputate maximus. Vestibulum aliquam si amet urun aget aurond.	If the signature should be displayed
		Automate placement of a signature box in the centre of all the document's You can the follo
		Move, resize, rotate or delete just this signature. Configur Move, resize, rotate or delete all signatures by the same signer at once. Ontions
	Test Person 1 Test Person 2	C Rotate the signature box or all boxes 90"
		Ueste the signature box or all boxes

User manual

If you added more than one signatory in the

previous step, you would now need to position them on the document.

CLICK & Sign



Step 5 Document Editing

- Prepare your document for signature with these customisation options:
- Within the document, select which fields should be editable.
- The properties of each field you select will be displayed on the right-hand side for easy access.
- Designate which fields the recipient can edit, ensuring controlled flexibility.
- Editable fields are restricted to completion by the assigned signatory only.



Field selected and editable by the recipient

	Document editing	
Impuesto sobre la Renta de las Personas Físicas Retenciones sobre rendimientos del trabajo Comunicación de datos al pagador (artículo 88 del Reglamento del IRPF)		
prómie science a bienera a entargapane dans do la data a existencia noda, la visión da su la proba polí ender supor a bajecularito. En discuportanza de la discuporta de la su data, produce para entargapane de discuportante al encione de que trata.	Field properties	
Datas del perceptor que efectuía la comunicación Andes y terter Ne de recruente	Assigned to	
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Casadró y re saparate/s lagarente con otragan el deter en esta superiora a 1.500 anna sunake, esciadas ta eurotas Por de do consego te la marcado la casala o, de bara consigner en esta casale el Hi de so colregagi		
Biscon time inter 4 to i o di anticon planter la legi casta cue respectivamena apertera a supertera supertera a supertera	Mandatory	
Model a projection : a narrowsteen character de montance de montance de montance de narrowstee de narrowstee de narrowstee de manaterie de montance de	Field enabled	
(2) Hips y dress descendentes menores de 25 alos, o mayores de dicha edia di sion discapazitados, que conviven con el perceptor (2) Hips y dress descendentes menores de 25 alos, o mayores de dicha edia di sion discapazitados, que conviven con el perceptor (2) Hips y dress descendentes menores de 200 km/s (2) Hips y dress descendentes en discapazitados que non en el perceptor (2) Hips y dress descendentes en discapazitados que non el perceptor (2) Hips y dress descendentes en discapazitados que non el perceptor (2) Hips y dress descendentes en discapazitados que non el perceptor (2) Hips y dress descendentes en discapazitados que non el perceptor (2) Hips y dress descendentes en discapazitados que non el perceptor (2) Hips y dress descendentes en discapazitados que non el perceptor (2) Hips y dress descendentes en discapazitados que non el perceptor (2) Hips y dress descendentes en discapazitados que non el perceptor (2) Hips y dress descendentes en discapazitados de las descendentes (2) Hips y dress descendentes en discapazitados de las descendentes (2) Hips y dress descendentes en discapazitados de las descendentes (2) Hips y dress descendentes en discapazitados de las descendentes (2) Hips y dress descendentes en discapazitados de las descendentes (2) Hips y dress descen	Done	
The second secon		Specify t editor fo
RI Solamente en el caso de hijos adoptados o de menores acogidos. Tostêndose de hijos adoptados que previemente Indéren estado acogidos, indique únicamente el año del acogimiento.		each fie
The contents maynese 4 65 S Alms, a memores de dida vedid al un discipaziolation, que conviens con di percepturi Mich de secondentes maynes 4 6 S Alms, a memores de dida vedid al un discipazione al una constructione al una constru	editability of the fields to suit your document's	to streamli the sign
C Pensiones compensativities on flow of clongery a multifielder par alimentes on flow of ice bins, flyade ambas par decisios judicial Pensiones measures in the of kingery party and a coll clonger institute party institute party Pensiones measures in the flow to be the bigs where have even that the party institute party instingery institute party institute party institute party institute p	requirements.	process.
5. Pagos por la adquísición o rehabilitación de la vivienda habitual utilizando financiación ajena, con derecho a deducción en el IRPF		
Importante: solo podrán cumplimentar este apartado los contribuyentes que hayan aciquirido su vivienda habitual, o hayan satisfacho cantidades por obras de rehabilitación de la misma, antes del 1 de enero de 2013.		
il està VO. efectuando pagos por prisitamos destinados a la adquisición o refabilitación de su vixienda habitual por los que vaya a tener derecho a deducción por inversión em elvienda habitual en el 1997 🔲		



Step 6 Review and Send

From this point, you can make the following modifications:

1. - The selected template

2. The documents to be signed: If you wish to replace the current PDF document with another, you can do so now.

3. Signatory documentation: request documents from the signatory before they sign.

4. Signatory's data: Update the signatory's details.

5. Signature placement:

Finally, click on Send

Check details and send

Before sending, please check that all data is correct

1. Selected template: Signature with Digital Certificate	2
Z. Documents to send	
Documents to be signed	
nvoice.pdf	
R Modelo, 145, referable.pdf	
 3. Documentation requested to the signatories 	<u>ě</u>
Documentary evidence: 💿	
I ID card Mendeury	
8 4. Signatories	,
	Perallel signature
1	Signatures required: 2
Test Person 1 emajor@Bitds.net	Digital certificate
Test Person 2	Digital conificate
john.doeteemail.com	
℅ 5. Document editing	2
Editable fields of the document have been assigned to the signatories	
/- Pravious	I send



Sent



In the left panel under 'Deliveries,' you'll find detailed information about each shipment:

- Status (In Progress, Signed, Cancelled, Error, Expired, Exceeded One-Time Code Entry Attempts, Declined, Exceeded Authentication Attempts at the Signing Page)
- Delivery ID
- Signatories
- Timeline
- Day of sending
- Expiry date
- Type of signature
- Documents: The original attached PDF documents. Once signed, the documentary evidence and signed documents will be annexed.
- Actions: Send reminders or cancel sending

You can also export these in a CSV file and apply a quick filter to search for a specific delivery.





Sendings

Timeline

Signatory`s details





What does the recipient receive

The recipient will receive a registered email at the address provided during the set-up of the delivery.

The email will include a tab which the recipient must use to access the document for signing.

After accessing the 'View Documents' tab, the recipient must follow the steps to sign with the digital certificate, completing the signing process.







Send > What the Recipient Receives

If you have incorrectly entered your recipient's personal identification during the delivery set-up, they will not be able to complete the process correctly.





Signed! The process has been successfully completed. You will soon receive documentary evidence and the signed document in your email and user area.









1. Template Selection

Choose one of the available templates. If you want to create a new template, refer to the Templates section of this manual.

The fields needed in the CSV will depend on your specific requirements, so be sure to review the "CSV Guidelines" for detailed instructions.





Via CSV

2. Upload the document to be signed

You can upload one or multiple documents.





Via CSV

3. Upload the CSV file





Via CSV Via CSV file ? How to set up the CSV 4. Signatories' list Select the type of field for each column in the CSV (such as name, email, etc.).. Click on each column Signatories' list Select template \checkmark and choose the appropriate field Add your list of signatories in CSV from the drop down menu. Upload documents Mandatory fields are marked with Character field separator Do not import the first row \sim ~ an asterisk (*). Keep in mind that the required CSV file upload в С А fields will vary depending on your \checkmark Name × × Email * × × Select type \sim needs. Refer to the "CSV Guidelines" if you have any questions. Name email@email.com Signatories' list 4 ID of the sending * email2@email.com Name2 Signatory's personal identification number * **Document editing** Name3 email3@email.com 5 Signature positioning and assignment External Identifier Name4 email4@email.com of editable fields email5@email.com Name5 Finish 6 Review and send Displaying 5 rows of 7

×



Via CSV

5. Document Editing

Manage the placement of signatures and configure editable fields.

In this step, you can assign each form field to a specific signatory. You can also decide whether the fields will be autofilled with CSV data or manually completed by the signatory.

Additionally, you can place each signatory's signature in the document.

Documents		
		Field properties
- Invoice.pdf	SERVICE CONTRACT	Assigned to
	I. Ine Parties. This Service Contract ("Agreement") made 20 Is by and between:	1 Torono 1
Fields	Service Provider", with a mailing address of	Test Person I
	Client:, with a mailing address of ('Client').	Mandatory
Signature 7est Person 1	Service Provider and Client are each referred to herein as a "Party" and, collectively, as the "Parties."	
	NOW, THEREFORE, FOR AND IN CONSIDERATION of the mutual promises and agreements contained hereing the Clean three to Service Provider to work under the terms and conditions hereby agreed upon by the Parties:	Field enabled
	II. Term. The term of this Agreement shall commence on 20 and terminate: (check one)	
	☐ - ALWIII Written notice of at leastdays indice.	Done
	III. The Service. The Service Provider agrees to provide the following:	Assign value
	Hereinafter known as the "Service".	From the CSV 🗸
	The Service Provider shall provide, while performing the Service, that he/shefthey shall comply with the policies, standards, and regulations of the Client, including local. State, and F-dercal laws and to the Set of their abilities.	Default value
	IV. Payment Amount. The Client agrees to pay the Service Provider the following compensation for the Service performed under this Agreement: (check one)	Choose a column 🗸 🗸
	□ - S/ Hour □ - S/ / per Job A "Job" is	Column A: ID
	Hereinafter known as the "Payment Amount".	Column B: Column 2
	R.	Column C: Column 3
	Page 1 of 4	Column D: Column 4
	V. Payment Method. The Client shall pay the Payment Amount: (check one)	← Previous Next step →

5. Finish Review and send





Sent

Access and review the status and detailed breakdown of all processed deliveries.

Search filters

- Status: New / Signed / In progress / Maximum attempts single-use code / Error / Cancelled / Expired / Signed jointly / Declined
- Type of signature: Options include Biometric, Single-Use Code, Simple, Typed, or Digital Certificate.
- Date

Technical details of the sending

- Status
- ID sending
- Signatories
- Time line
- Day of sending
- Expiry date
- Type of signature
- Documents: The original attached PDF documents. Upon signing, documentary evidence and the signed documents will be added.
- Actions: Send reminders or cancel sending as needed.

Delivery status

 Signed / In progress / Cancelled / Failed / Expired / Single-use code attempts exceeded / Declined

Export

Export the sent list in CSV format

CLICK & Sign 🔎	«	Sent list							Credits 74.4	۰ ::	А. н	, emajor E
Send		Search			Q	Status	✓ Type of signat	ture 🗸	27 Jan - 25 Feb	0 - 1 of 1	< >	Export 🕁
		STATUS	DELIVERY ID	SIGNATORIES			date of delivery $ \sim $	EXPIRY DATE	TYPE OF SIGNA	TURE DO	DCUMENTS	ACTIONS
🔹 Dashboard		In process	1645780768670		0	0	25/02/2022 10:19:31	27/03/2022 11:19:31	Single		D	> 🗊
📥 Sendings						Q						
A Templates												
		2021 © Lleida.ne	et									⑦ Help



Sendings

Time line

Clicking on in the magnifying glass icon ,to explore the time line of each delivery, which includes crucial technical details for better oversight and management.



Sendings

Time line

Signatory`s details

			User manual
	Signatory`s details		× CLICK & Sign
	General Level (level)	IP address (p)	0
	0	95.17.146.132	
Time line See technical details	Date created (signature_start_date)	Signature ID (signature_id)	×
	03/17/2023 13:34:50	16790564890400000	
Begin the process	list_signatory_details_signatory_id_number (signatory_id_number)	Final redirection (signatory_url_redirect)	
Signatory ID: 16790564900400000	OTP attempts (otp_tries)	list_signatory_details_signatory_surname (signatory_surname)	
Process ID: 16790564890400000	0 list_signatory_details_signatory_name	Status	
	(signatory_name) Test%20Eva%20Test%20Major	(signatory_status) signed	
	Documentary evidence (signatory_evidence_generated)	Email (signatory_email)	
🖂 Initial email	Y		
Delivered Unregistered SMS communication	Ist visit the signature page (signatory_landing_date)	Phone (signatory_phone)	End of process
T II:34:50 © 17-03-2023	Signatory ID	Last status change date	◙ 13:37:08 ◎ 17-03-2023
	16790564900400000	03/17/2023 13:37:08	
40 50 0	Emails		20 30 40 50 0 10 20
17 March 13:34	Message 1 It is a Registered message (registered)	CC (cc)	17 March 13:37
	N		
	Date of delivery (sending_date)	For (to)	
	03/17/2023 13:34:50		
	BCC	Last status change date	
		03/17/2023 13:34:50	
	Status (status)	Type (type)	
	delivered	start	
	(recipient)		
	+34		

B



Manage existing templates or create a "New Template"

Template Directory

Search

ID

Name

Signature type

Options include Biometric, Single-Use Code, Simple, Typed, or Digital Certificate.

Company:

Name of the sending company

Expiration time Duration available for the recipient to sign the document

Language:Language of the template

Actions: View Details, Duplicate Template, New Dispatch, Download Source Code, Deactivate

Activated Activated templates (can be reactivated after deactivation by selecting "Show Deactivated Templates")

CLICK & Sign 🔎	Tem	plate list General				Credits 74.4	a ::	🌲 Hi, emajor 🛛 E
Send	Sea	arch		Q	Show disabled to	emplates 0 - 6 de	6 < >	+ New template
	ID ~	NAME	TYPE OF SIGNATURE	COMPANY NAME	EXPIRATION TIME	LANGUAGE	ACTIONS	ACTIVATED
 Dashboard Sendings 	42	ClickAndSign	Single	Test company	30 days	English	Q 🗎	>
A Templates	41	ClickAndSign HW OTP	Biometric One time password (OTP)	Test company	30 days	English	Q (1) 	>
	39	ClickAndSign OTP	One time password (OTP)	Test company	30 days	English	Q (1) 	>
	38	ClickAndSign HW OTP	Biometric One time password (OTP)	Test company	30 days	English	Q 🗐	•
	37	ClickAndSign	Single	Test company	30 days	English	Q 🗐	>
	36	ClickAndSign OTP	One time password (OTP)	Test company	30 days	English	Q 🗐	
								(7) Help

+ New template

1. Basic Data and Branding

Template name

Company Data: Name of the company or contact Company tax ID Language Languages for communications sent out Senders: Name or mobile of the SMS sender Email sender **Expiration remaining time** Days / Hours / Minutes

Branding:

· Company Logo: drag and drop or upload it Text colour. Background colour "Sign" button text colour Background colour of the button

Preview email Preview signature page





+ New template

2. Contacting Signatories

Via email or SMS

How would you like to notify the signatories that they need to sign?

 $\ensuremath{\textbf{Via SMS:}}$ Add the sender's number and craft the message using available tags.

 $\ensuremath{\textbf{Via Email:}}$ Add the sender's email and compose the message using available tags.

Both methods can be registered.

Note If you wish to direct the signatory to your website, do not select any notification method. When you call the API, you will receive the URL to which you need to direct the signatory.

<complex-block> • Rest • R</complex-block>	CLICK & Sign ${oldsymbol{\mathcal{D}}}^*$	te General	Gredits 24.4 🙈 🐩 🎄 Hil errejor 🗉
<complex-block> • rend • r</complex-block>	Send		
<complex-block> • reme • reme •</complex-block>	🔹 Dashboard 🗸 🗸	Information and brand image Name, email address, logo, etc.	Contact the signatories
<complex-block>• variant • variant</complex-block>	C Sendings		per non you want to noticy one calls a rare only name documents to remem and again
<complex-block>Functional and the second second</complex-block>	A Templates	Contact the signatories By email or SMS	Sending an SMS
 Finder demonstration <	3	Signature status Biometric or single signature, OTP	
<complex-block></complex-block>	1	Signatories' documentation	By Registered SMS
I control in the second sec		Upload payslips, receipts, etc.	Default value
<complex-block></complex-block>	5	Reminders 📀 Outstanding document notifications	If left empty, the default value is used Message text
 Provide a read way of the second and the s		Notifications (0)	
	6	Communications on changes of status	
Image: Section of the sec	7	Advanced settings	Available tags:
• Priori • Priori • Priori • Priori • Priori • Priori • Priori • Priori • Priori • Priori • Priori		URLs for advanced users	Roontract.jdd Barlil Anamed
Sading an enall Briggeren Enall <th>8</th> <td>Finish Check it and save it</td> <td>>> Preview</td>	8	Finish Check it and save it	>> Preview
Constant and			
• provention • provention			Sending an email
Protocol • Bread • Construction • Perform Construction <p< td=""><th></th><td></td><td></td></p<>			
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rdstrengs drei dirkst state stated Fur i dare Unstate state Unstate state Unstate state Unstate state Unstate state Unstate state Unstate state Unstate state Unstate State Unstate			Sender Default value
forst balance within type:			If lefs empty, the default value is used
A status • status			Email subject
Andrehme: Andrehme: Consistent area free: Market regis Market register register register register register register Market register </td <th></th> <td></td> <td></td>			
Customical aread toos			Avanaou taga: Hoostract_id# #url# #name#
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Australia It and the add multi attachments not requiring systems Image: Instant and multi attachments not requiring systems Image: Instant attachments not requiring systems Image:			Available tags:
I want to add wand attachments not requiring signature Previous Image: Section of the se			Postract_id# Built Brane#
			I want to add email attachments not requiring signature
Note to developer: Upware to mellect the signatorie from your web page, do not under you would page do not under you would receive the URL, where you would receive the signatory.			>> Preview
Note to developer: Upwardt meller etter signature from your web page, do not under your workducted. When called up AAP you will receive the URL, where you must reflected the signature.			
Note of overlappen Were stored by the store of the stored by the store of the stored by the			
6. Product			Note to developers: If you want to redirect the signatories from your web page, do not send any notification. When calling the AP you will receive the URL where you must redirect the signatory.
			<- Previous Next step ->

User manual

Templates

+ New template

3. Signature Settings

Choose one or several types of signatures:

Single signature

Biometric signature: Handwritten signature. Typed signature: Signature typed using the keyboard. OTP Signature: Set the number of characters for the code, the number of attempts, and the method of OTP delivery (SMS or email). Write your text message with the provided tags.

Signature with digital certificate: When selecting this type of signature, the signatory's identification number must be entered at the time of sending the email or SMS. Note: To utilize this option, the signatory must possess a digital certificate

issued by Lleida.net.PKI Indenova)

Biometric signature, typed signature, and one-time code can be combined within the same signature process.

Activation of the Signature Button

- Always
- Active when all documents have been opened. ٠
- Active when all documents have been fully read.

Options to Decline Signing .

- No
- Yes, without requiring a reason for rejection.
- Yes, making the provision of a reason optional.
- Yes, mandatorily requiring a reason for rejection. ٠





+ New template

4. Documentation of Signatories

Request documents such as payslips, receipts, etc.

You may ask the signatory to upload documentation before signing. This step is optional

Simply click "Add Document."

It is possible to request up to 5 documents, whether mandatory or optional, and all can be registered



+ New template

5. Reminders Remind signatories via SMS or email that they have documents to sign

Choose when you want to send the reminder.

Review before saving.

Click "Save."

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			SMS preview Save			
Previous			Previous Next step ->			

User manual

Templates

+ New template

6. Notifications Automatically send SMS or emails to notify about the status changes of a signature process.

Notify the signatory or signatories by SMS or email with the following updates (you can add as many types of notifications as you want):

- When a user has signed. .
- When a signature has been cancelled.
- When a signature has expired
- When a signature has generated an error .
- When the maximum allowed OTP . attempts have been reached
- When a signing order has been completed successfully
- When the signature process has concluded successfully
- When the signature process has NOT concluded successfully

Review before saving.

Click "Save."

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Send			U
 Dashbaard Sendings Remplates 	 Information and brand image Name, email address, logo, etc. Contact the signatories permail or SMS Signature status Biometric or single signature, OTP Signatories' documentation Upload payalise, receipts, etc. Signatories O Constructions O Constructions O Constructions O Advanced settings URLs for advanced users Finish Check it and save it 	Abaagement of notifications. I where a user has signed I where user has signed	
		<pre>* Contract_GB #uff #name# *> SMS preview ************************************</pre>	

User manual CLICK & Sign

Templates

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7. Advanced settings URLs for Advanced Users

Choose to display signatories on the signature page and/or select a URL to redirect signatories after the signing process is completed.

CLI

Add URLs for event notification in the process:

- Status changes of each signatories ٠
- Status changes of the signature process ٠
- SMS status changes Status changes of the emails .
- Status changes performed on the . signature page

gu lo « New ten	General		Credits 123.2 🔈 🏥 🌋 Hi, emajor
Send			
pard .	Information and brand image Name, email address, logo, etc. Signatories identification Identification to access the documents	Advanced settings Manage status changes via events and set	up the final redirection
	Contact the signatories By email or SMS Signature type Select the electronic signature you	To redirect the user to the following URL	at the end of the signature:
	would like Signatories' documentation	Event notification	
	Upload payslips, receipts, etc. Reminders	Status changes of each signatories	Status changes of the signature process
	notifications	SMS status changes	Status changes of the emails
	Communications on changes of status	Status changes performed on the signate page	ire
	Advanced settings URLs for advanced users	https://	
	 Finish Check it and save it 	Previous	Next step ->
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8. Finish Review and save your changes.

Check and modify as necessary

- Information and branding
- Contacting signatories
- Signature settings
- Documentation requested to the signatories
- Reminders
- NOTIFICATIONS
- Advanced settings

New templat	e General	Credita 14.4 d	1 & H. empr
~	Information and brand image Name, email address, logo, etc.	Check the data and save the template	
1 💌	Contact the signatories By email or SMS	¥ 1. Information and brand image	
~	Signature status Biometric or single signature, OTP	I Terrolate name: Denno terrolate	
	Signatories' documentation	Company or contact name: Domo company	
	Reminders	Language of the sending: English Name or mobile number of the SMS sender: Democompany	
×	Outstanding document notifications	Expiration remaining time: 30 days Company WE number: 12345938	
	Notifications 😦	Language of the documentary evidence: English	
		Sender of the emails: demol@company.com	
~	Advanced settings URLs for advanced users	Lleida.net Cloud	
8	Finish Check it and save it	Text colour	Background colour
		Button text	Button background 🔵
		 2. Contact the signatories 	
		Message 1	
		冊 SMS	
		Registered email Torref, we are pleased to inferry yes that the	document
		#contract_Id# has been sent to you. Please sign it by visiting the webs	ite Parl# . Thank
		8 3. Signature status	
		Signature: One time password (OTP)	
		1 Number of OTP characterists	
		1 When the OTP is sent; When accessing the signature page	
		1 When the signature button is activated: Always 1 Message 1	
		jii SMG	
		_ Registered email 💿	
		 Netssage time: User energies your Oin to sign the occurrent energies. Please sign the docurrent using this code. Thank you 	source, and is
		> 4. Documentation requested to signatories	
		S. Reminders	e
		Reminders I: 7 days	
		JII SMS	
		Message text: Dear framef, we kindly remind you that your docum	ert #contract_id#
		signature is still pending. Please visit this URL avrit to sign it. Thank y	94.
		>> 6. Notifications	e .
		>> 7. Advanced settings	e
		< Previous	Save .

UCK & Sign 🖉

5 Sendings



1. Email notification

The signatory receives a Registered email Clicks on the "**View Documents**" button, which directs them to a web page where they can review and sign the documents.

Both the email and the signature web page are customised with the logo and colours chosen by the company using the Click & Sign platform.

How the recipient signs depends on the choices made in the template set-up (Point 3. Signature Settings).





2. Signature web page

If an access code was added in Step 4 of Signatory Data, the first screen the signatory sees after clicking "View Documents" is the access code screen.
 Access code
 Access code

 To view the documents, please enter your access code.
 To view the documents, please enter your access code.

 View documents
 View documents

Back

If document upload was requested before signing in Step 3 of Signatory Documentation, the signatory will now be asked for these documents, which may be mandatory or optional depending on the settings specified at that step.

Once all documents are uploaded, the signature process continues There are 5 types of signatures:

A. Simple signature
B. With OTP
C. With handwritten signature and OTP
D. Typed signature
E. Digital Certificate Signature

Document uploading	
I must upload the following documentation:	
ID card * Click or drop a file here to upload it	Ĺ
Driving license * Click or drop a file here to upload it	Ţ
Latest payslip Click or drop a file here to upload it	Ĺ
Next	
Compulsory documents	





2. Signature web page

a) Simple signature

From the signature web page customised with the logo of the company the document is displayed.

A OR code appears in all cases, facilitating viewing and signing on mobile.

After reviewing the document, the signatory clicks on Sign.

The message "Signed" is displayed





2. Signature web page

b) Using an OTP

The signing platform displays the document, with the company's logo.

After reviewing the document, the signatory clicks 'Sign'.

They receive a OTP via SMS or email,

enter it into the designated field on the platform, and upon correct entry a confirmation message "Signature Completed" is displayed.





2. Signature web page

c) Using Handwritten Signature and OTP

The signing platform displays the document, with the company's logo.

After reviewing the document, the signatory clicks 'Sign'.

The signatory signs in the designated area

and receives the OTP via SMS or email.

Enter the OTP in the space provided

If correctly entered, "Signature Completed" is displayed.













Signed



2. Signature web page

d) Using Typed Signature

From the signature web page customised with the logo of the company the document is displayed.

After document review, the signatory types their signature

into the enabled field.

CLICK & Sign Typed signature Enter your name to sign the document. Documents demo contract.pdf Jane Doe SERVEIS TELEMATICS S.A., known as The client. of all these conditions. Jane Doe ject, who, disposing of Sign message services. ded to third parties Back the client shall instruct nem accordingly over its use. Likewise, the client shall be responsible t e utilization cost, and be answerable directly to Lleida.net for any inappropriate use of the services. s of the client Biometric or typed signature njoy the right to the use of the services specifically contracted for with Lleida.net. Select whether you want to draw your (biometric) signature or type your name. ged to make the payments agreed, according to current rates, together with the AT and on the dates stipulated. Draw Type to maintain the IT support essential for access to the services (*) View disclaime 命 Sign Back

If both handwritten and typed options were provided, the signatory can choose either method.



2. Signature web page

e) Signature with digital certificate

From the signature web page customised with the logo of the company the document is displayed.

The Signatory after reviewing the document clicks on Sign

The signatory chooses whether to sign

- 1) On a computer (Windows only)
- 2) Via Cloud-Based Centralised Signature:
- 3) On mobile





2. Signature web page

e) Signature with digital certificate

On a computer (Windows only)

The signatory can sign using a digital certificate installed or connected to their computer.

You need the eSignaDesktop program (JavaScript), which will be downloaded automatically if you don't have it installed.

1 In order to sign, you need to have the eSignaDesktop programme installed on your computer. Click on the button below to download the programme, and run the file to install it through a guided process. Download eSignaDesktop If you already have it downloaded but still see this screen, or have problems during installation, please visit our help page. The download may take 5-10 minutes, depending on your connection speed.

Open eSignaDesktop.exe?

- https://www.esignabox.com wants to open this aplication.
 - Always allow www.esignabox.com to open these types of links in the associated application

Open eSignaDesktop.exe



1)



208176c1-8930-4f4b-aeec 208176c1-8930-4f4b-aeec-48d Certificado emitido por :MS-Organi U=82dbac4-381-46c-9c73-0950c /álido desde :04/05/2022 15:17:33	c- c48dd3c48da2 <i>d3c48da2)</i> zation-Access + 1eaca97	^
Certificado emitido por ;inDenova 5 /álido desde :06/10/2022 9:22:38 /álido hasta :06/10/2023 9:32:38	SUB CA 003	
Adobe Intermediate CA 10 Adobe Intermediate CA 10-3) Tertificado ernitido por : Adobe Roo Drganización: Adobe Systems 'Alido desde : 17108/2018 19:37:58 'Alido hasta : 04/08/2068 19:37:58	⊢3 ot CA 10-3	
Adobe Intermediate CA 10	_A	¥
View cortificato	Accont	Cancel



2. Signature web page

e) Signature with digital certificate

2) Via Cloud-Based Centralised Signature:

Signing is possible if the signatory has a digital certificate issued by Lleida.net PKI (formerly Indenova)

i	
Connecting to the signature service	
Wait a few seconds while we access the signature service of Lleida.net.	

DIGITAL SIGNATURE	
User	
Enter your certificate password	S)
Sign	
	Cancel



2. Signature web page

Signature with digital certificate

3) Sign with mobile phone

Signing can be executed using the Lleida.net Wallet app with certificates issued by Lleida.net PKI (formerly Indenova) to be used on this app.



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• demo document.pdf	\odot				
		Continu	e	SERVEIS TELEMATICS S.A., h known as The client,	
			Back	e of all these conditions.	
	_	II. Clauses applying to the cli	ent		
		For the purposes of an appropriate IT ba The status of subscr without the previou In the event of servi them accordingly ov answerable directly	The present contract, client is that physical or jurified (is, stipulates a contract with lielda ane for the use ber is personal and non-transferable, and may not to express consent of lielda.net ce use by third parties authorized expressly by Lield er its use. Likewise, the client shall be responsible to Lielda.net for any inappropriate use of the service	al subject, who disposing of of its message services. Se extended to third parties a.net, the client shall instruct of the utilization cdst, and be 25	
		III. Rights and obligations of	the client	antid for with Unide not	
	_	The client is obliged corresponding VAT a The client agrees to	to make the payments agreed, according to current on on the dates stipulated. maintain the IT support essential for access to the s	rates, together with the	
	105750 9676393				
(*) View disclaimer			·		
			Sign with Lleida.net V	/allet	
		,	Access Lleida.net Wallet on your device to co	mplete the signature.	



2. Signature web page

Signature with digital certificate

3) Sign with mobile phone

Follow the app's instructions and select the certificate for signing. Select the certificate to sign.

C







® ⊘ II. II. &

CANCEL USE PIN

 \bigcirc

What does the signatory receive?

2. Signature web page

Signature with digital certificate

Sign with mobile phone 3)

After selecting the certificate, the signatory will receive an SMS and an email with a onetime password (OTP) to verify the signing process.

To continue, the signatory signs with their fingerprint or PIN.

C





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2. Signature web page

Signature with digital certificate

3) Sign with mobile phone

The signature process has started successfully. Track the status of the process from the browser.

The browser displays the message Signed!







3. Declining to sign

If enabled, signatories have the option to decline to sign, with an option to state a reason for the refusal,

which is either optional or mandatory based on prior settings.





3. Declining to sign

If enabled, signatories have the option to decline to sign, with an option to state a reason for the refusal, which is either optional or mandatory based on prior settings.

The signatory clicks on 'Decline to Sign'

A message 'Signature Declined' is then displayed.





3. Email confirmation of signature

Signatories receive a follow-up email confirming the signature,

which includes documentary evidence and the signed document(s).

test@company.com <sign_dev3@clickandsign.eu> E Congrats! Your contract has been signed To:</sign_dev3@clickandsign.eu>					
		View on browser			
	CLICK & Sign 🞾				
	Congrats! The following documents have been signed:				
	demo contract.pdf Sender: test@company.com Recipient:				
	The electronic signature through Click & Sign complies with the current national regula in the following link: https://www.lleida.net/en/legal-framework	tions described			
PDF MS1645784511 97000_00.0df	Disclaimer / Data Protection	ida.net [°]			



What does the company receive?

Sent list

The status and details of the deliveries change once the recipient signs the document.

Delivery status

- Signed
- In process
- Cancelled
- Incorrect
- Expired
- Exceeded OTP attempts

Documents

Download the documentary evidence or click the 'view' icon to access the 'All Documents' window, where you can download the original documents.

- Original documentation
- Signed documentation
- Attached documentation
- Documentary evidence
- Biometric documentation

CLICK & Sign 🔎 🤍	Sent list Credits 67.4 🔈 👫 Hi, emajor	Е
Send	Search Q Status V Type of signature V 30 Jan - 28 Feb 0 - 1 of 1 < > Export	t ≟
	STATUS DELIVERY ID SIGNATORIES DATE OF DELIVERY ~ EXPIRY DATE TYPE OF SIGNATURE DOCUMENTS ACTIONS	
🕏 Dashboard	Signed 1646038153822 Q 28/02/2022 09:49:17 30/03/2022 10:49:17 Biometric One time password (OTP) Image: Content of the password (OTP) Image: Contentof the password (OTP) Image: Content of the pass	
📥 Sendings		
👌 Templates	All the documents ×	
	I demo contract.pdf	
	Global signed documentation	
	Attached documentation	
	I ID card.png I Driving license.png	
	2021 © Lleida.net	elp
	Documentary evidence	
	Biometric documentation	

Documents



Signed documents

Sample documents

- Documentary evidence
- Signed documents

Lleida.net securely stores documents for five years.

Documentary evidence

Registered communication certificate	
Click&Sign CLICK & Sign	General conditions of the contract
Certificate ID: M516460381578800000_16460381578800000	1. Previous clauses
Emirates Post certifies that the data contained herein are those contained in its electronic communications records corresponding to the following tranactions carried out on behall of the user registered under the name business name.*	 The present conditions regulate the appenents between ULEDARTWORKS SERVET TELENATCS S.A. Intercolorways, and the users of the services, henceforth lowares as the client, cancelling any other previous agreement. Access for the first time to the ask services presuppose sepress acceptance of all these conditions.
2022-02-28 09:49:19 UTC+1: You have sent an EMAIL of type process start certificate to the email address emajor@ileida.net.Documentary evidence attached: Mail_16460381578800000_start_463316.pdf	II. Clauses applying to the client
2022-02-28 09:49:19 UTC+1: You have sent an SMS of type process start certificate to the phone number +34634563770. Documentary evidence attached: SMS_16460381578800000_start, 428896.pdf	 For the purposes of the present contract, client is that physical or jurical subject, why disposing of an appropriate IT basis, stipulates contract with black much for the use of its mergin benezes. The status of subscriber is personal and non-transferable, and may not be extended to thail parties without the personas genezes contract of black mergin.
On the web address https://signet.address.ht	 In the event of service are by third parties authorized expressly by lucka, not, the coert shall initiate them according over it sue. Luckneis, the client shall be reportable for the number call, and be answerable directly to Leicka net for any inappropriate use of the service.
2022-02-28 09:50:41 UTC+1: The web address to sign the documents has been accessed.	 The client will enjoy the right to the use of the service specifically contracted for with Lieida.net.
2022-02-28 09:50:41 UTC+1: You have sent an EMAIL of type OTP notification certificate to the email address emajor@ileida.net.Documentary evidence attached: Mal_16460381578800000_stp_479967.pdf	 The client is obliged to make the payments agreed, according to current parts, together with the corresponding Var I and on the dates stipulated. The client agrees to maintain the TI support excepted by access to the services. The client is responsible for the correct use of the services.
2022-02-28 09:50:41 UTC+1: You have sent an SMS of type OTP notification certificate to the phone number +34634563770. Documentary evidence attached: SMS_15460381578800000_otp_741884.pdf	action which could damage systems, edupoment as even gas accessed directly or indirectly via Lieda act including deliberately concept in lisks on systems, and in accordance with the specifications contained in the present general condition
2022-02-28 09:53:00 UTC+1: You have received an HTTPS request from IP 10.40.0.30 corresponding to the uploading files event. The uploaded compressed image is attached as evidence: ID card.png	IV. Contracting of services Contracting the services of likely not the truth name (http://www.rikitandsim.eu/) is effective for carrying out
2022-02-28 09:53:02 UTC+1: You have received an HTTPS request from IP 10:40.0.30 corresponding to the uploading files event. The uploaded compressed image is attached as evidence: Driving license.png	the following steps: 1. Entering identification and images details of the Client.
2022-02-28 09:54:38 UTC+1: You have received an HTTPS request from the IP 10.40.0.30 corresponding to the signing event. Documentary evidence attached: HTTP_LOG_16460381578800000.txt	in the event of the Clench being already enrolled in the service, but the details shown being incorrect, the Clench contact contact contact contact and a 973 300, or by email clentes⊜lead ent, to correct them
The type of signature made in Lleida.net's web environment includes the following elements: - Biometric signature	 Payment or services a virtual rout of sale is activated by means of creat care to effect payment of the lequiled creating. Confirmation of purchase. An e-mail will be sent to the address given in stage 1 of the confirmation of purchase.
- Signature with One Time Password (the code used is 2554) - Clicking the signature button	 Determined Deheny of invoice. Within the maximum lapse of 24 hours, the invoice will be sent in a pdf archive at the indicated email address.
In the event that the biometric signature process of all the signatories has been completed, the original documents signed with biometric data will be available for download with the "biometric" code.	V. Term
All the above is certified at the request of the person concerned for the evidence deemed appropriate.	 The present contract has a minimum duration of one month it will be renewed automatically for similar periods of time so long as neither party has meanwhile expressed, in writing, a month in advance, the internion of terminating the arcrement.
February 28, 2022	Lieida.net reserves the right to reacid the present contract before it ends, for justified cause, previously informing the customer with the minimum warning of ONE MONTH in cases where,
Attachments:	according to these conditions, automatic rescinding of the present contract is appropriate. However
nie niename	



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> (+34) 973 282 300 info@lleida.net

www.lleida.net

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Santiago de Chile · Dubai · Santo Domingo · Lima · San José