# Quick Start Guide
## Sign documents on the move

**oodrive**

**oodrive sign**

**Manage your contract activity**

The Contracts section contains all your transactions, allowing you to monitor them easily.
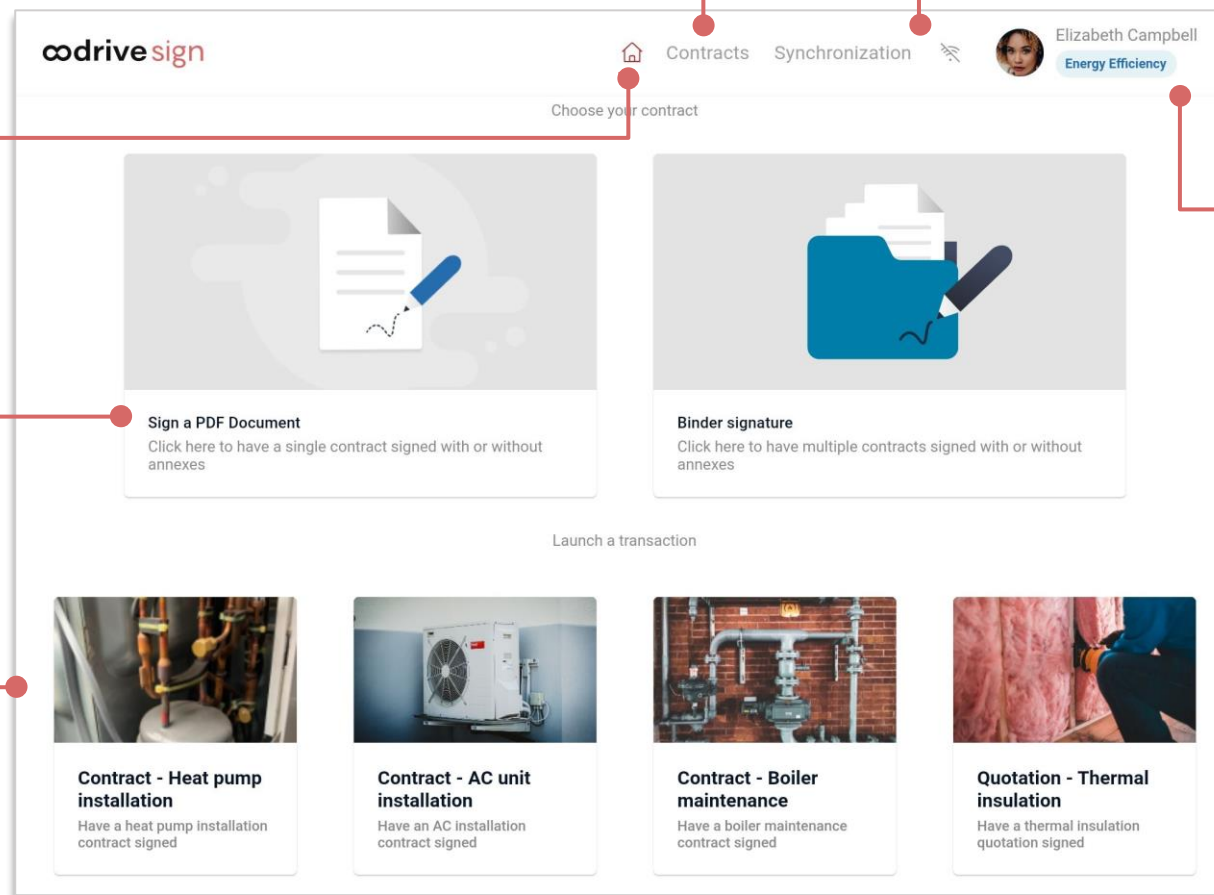
**Go to the home page**

Return to your license home page to launch a new transaction.

**Upload a contract for signature**

Launch a new transaction from a PDF document on your mobile device.

**Have a contract signed from a template**

Launch a new transaction based on an existing contract template.
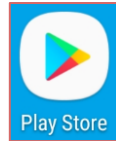
**Synchronize your activity**

The Synchronization section allows you to you synchronize data from your mobile device with the remote server.
A crossed-out Wi-Fi icon appears when you are offline.

**Manage your account**

You can go to the signatory directory, switch between permissions group (here: 'Energy Efficiency'), contact Support, or log out of the application.



**oodrive sign**

Contracts    Synchronization    Elizabeth Campbell    **Energy Efficiency**

Choose your contract

**Sign a PDF Document**
Click here to have a single contract signed with or without annexes

**Binder signature**
Click here to have multiple contracts signed with or without annexes

Launch a transaction

**Contract - Heat pump installation**
Have a heat pump installation contract signed

**Contract - AC unit installation**
Have an AC installation contract signed

**Contract - Boiler maintenance**
Have a boiler maintenance contract signed

**Quotation - Thermal insulation**
Have a thermal insulation quotation signed

# ① Download Oodrive Sign for Android

1. Go to the **Play Store**:



2. In the search bar, enter "Oodrive Sign".

3. Select the **Oodrive Sign** app in the search results.

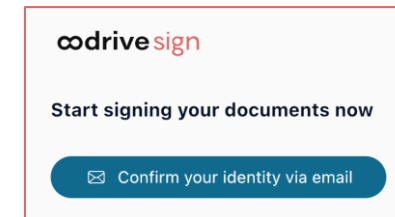4. To begin downloading the app, tap **Install**.
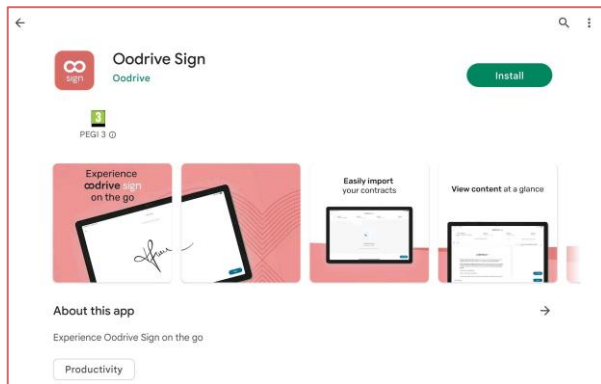


5. Once the download is complete, tap **Open** to access the app.
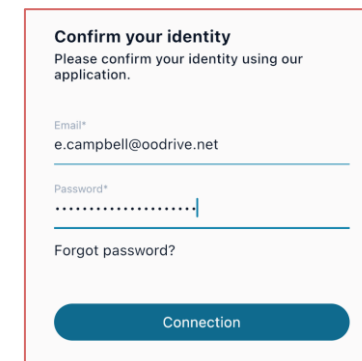
# ② Log in to Oodrive Sign

1. Tap the icon for the Oodrive Sign app on your home screen:



2. Tap **Confirm your identity via email**.



3. Log in to your license by entering your email and password. If you have forgotten your password, click **Forgotten password?**



Once logged in, the app synchronizes the most recent data related to your contractual activity (contracts, processes, signatories, etc.) to make it available locally on your mobile device.

# ③ Prepare the contract for signature

## Step 1: Upload the contract and its annexes

You can select a contract template from the templates already displayed on your home page, or upload a new document from your mobile device.

**1.** Go to the home page for your application and select the type of contract you want to have signed.

### To upload a contract:

- Tap the **Sign a PDF Document** section.
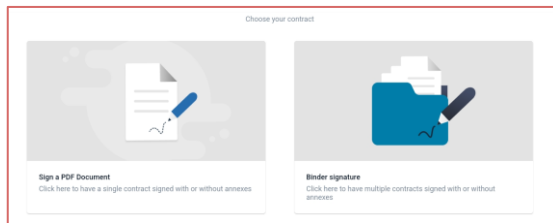


- Tap **Import** in the lower-right corner of the application and, if necessary, allow Oodrive Sign to access files on your device.

- Browse through the files on your device and select the document(s) requiring signature. If you select more than one, they will be merged.

### To use an existing contract template:

- From the home page of your application, select a contract template.
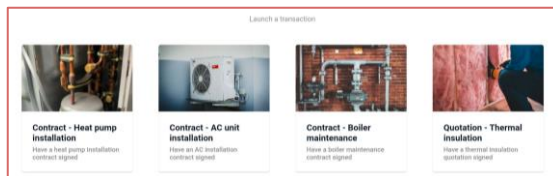


If it is a custom template with a personalized contract creation journey, follow the personalization steps to generate the finalized contract. You will then be taken directly to the step of adding signatories.

**2.** If you wish to add annexes to the contract, tap **Annexes**, then add the documents you want by:

- Taking a photo of a paper document using your mobile device, via the **Camera** button.

- Uploading a document that is already available on your device, via the **Upload** button.

Once you have finished adding annexes, go back to the contract by tapping the back arrow in the upper-left corner of the screen.
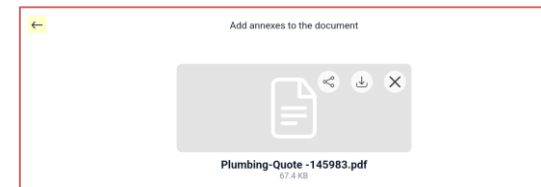


**3.** Tap **Next** to go to the next step.

## Step 2: Customize your contract

If the contract you have uploaded contains Smartfields® (fields for collecting variable content), you can customize it by entering the information supplied by your signatory.

**1.** To complete the Smartfields®, enter their values in the panel on the right.
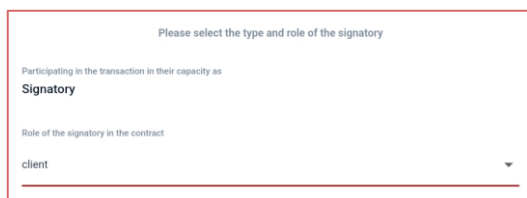


**2.** Once you have completed all of the Smartfields® required for the transaction, tap **Next**.
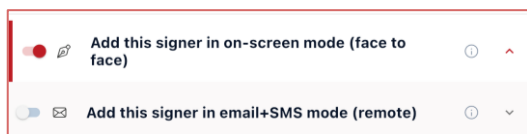
# ④ Add signatories

1. Tap the (**+**) symbol to the right of the **Signatories** section.

2. Select the signatory for your contract from the directory of signatories, then tap **Next**.

   **Note:** If the signatory does not yet appear in the directory, you can upload it from your contacts via the **Upload** button, or create it using the **Create new** button.

3. If your contract contains custom boxes, select the role of the signatory for the contract, then tap **Next**.



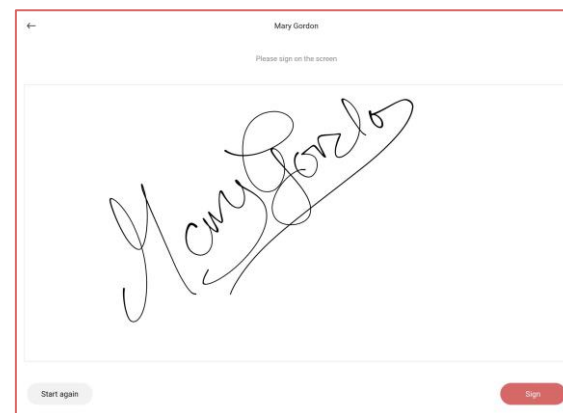4. Select a signature mode from the list of available modes.



   **Note:** If you select **Add this signer in email+SMS mode (remote)** while you are offline, the email will be sent once your device is connected to the Internet again.

5. When you have finished, tap **Add signatory**.

6. Repeat the previous steps as many times as necessary to add other signatories to your contract.

7. Once you have added your signatories, tap **Next**.

8. Allow access to the location of the device, so that it can be used as proof when signing the contract.

# ⑤ Have the contract signed face to face

If you have selected face-to-face signature, your signatory will be able to add their handwritten signature directly on the screen of your mobile device.

1. If your contract has multiple face-to-face signatories, select the signatory you want to sign first, then tap **Next**.

2. Let the signatory review the contract, tick the **I have read and agreed to the terms of the contract** box, then tap **Sign**.

3. Let the signatory add their signature on the screen using their finger or a stylus, and tap the **Sign** button again.



4. If your contract has multiple face-to-face signatories, tap **List of signatories**, then repeat the previous steps to have them sign one by one.

Once everyone has signed the contract, a confirmation message tells you that the document has been successfully signed. You can tap **Check my contract** to manage your contract, or else tap **Finish** to go back to the home page.
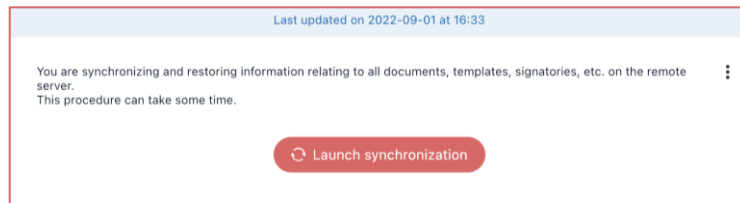
# ❻ Manage your contracts on the move

## Synchronize your contracts

When you find a stable Internet connection, you have the option of synchronizing your mobile application with the remote server.

Your local data is then sent to the remote server, and your device retrieves all contract items created on your workspace by your co-workers while you were offline.

1. In the menu along the top of the app, tap **Synchronization**.

2. Select **Launch synchronization**.



3. Wait a few moments for your device to download data from the remote server.

Your app data is updated and the contracts you have had signed locally on your mobile device become accessible on the web version of Oodrive Sign.

## Manage your contracts

You can manage your contract activity from your Oodrive Sign mobile app. The app allows you to view the details for a contract, edit the contract, or have it signed in face-to-face mode.

1. In the menu along the top of the app, tap **Contracts**.

   If you are offline, only contracts that have been created locally or downloaded at the last synchronization are available.

2. To find your contract, enter its name in the search bar above the filters.

3. You can refine your search by filtering the results by:

   - **Contract status**
   - **Signatory**
   - **Start and end date** of the transaction
   - **Contract type**
   - **Permission group** (Enterprise version)
   - **User** initiating transaction

   Select one or more filters to target contracts meeting these criteria.

4. Tap a transaction to see its details and view all the information for the transaction.
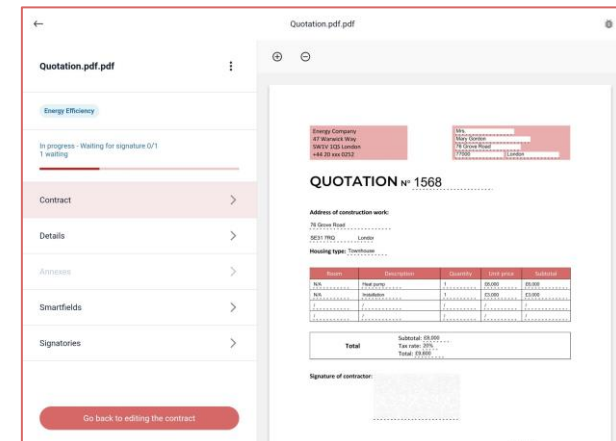


   In cases where a contract has not yet been signed, you can tap **Go back to editing the contract** to edit it.

5. If you wish, you can have a contract awaiting signature signed directly on your mobile device, regardless of the signature method initially selected:

   - Go to the **Signatories** tab.

   - Tap the three small dots to the right of the signatory of your choice and select **Switch to face to face signature.**