Quick Start Guide
Have a document signed

oodrive

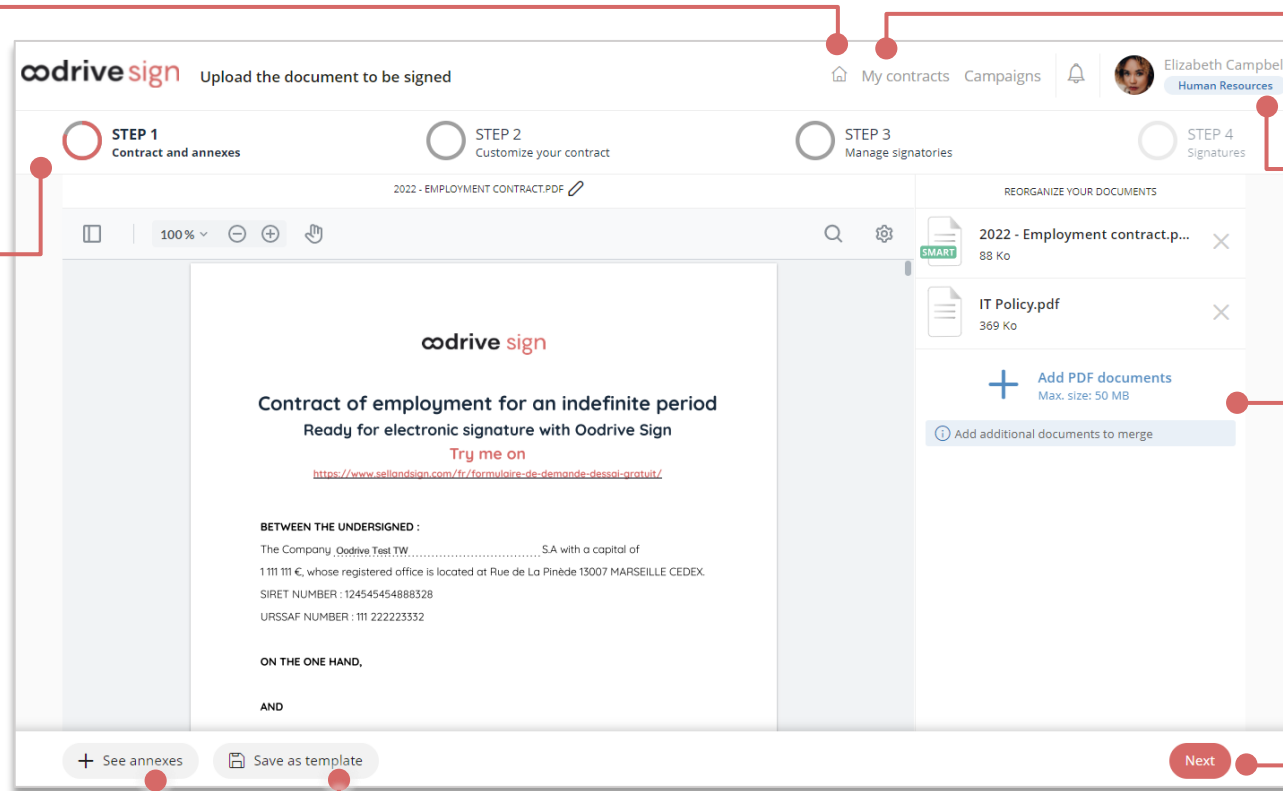**oodrive sign**

Go to the home page

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

Navigate from one step to another

You can click on steps to navigate freely between them. This lets you go back to a previous step to add or edit items.

Go to your annexes

Add annexes or collect them from your signatories. Annexes are documents that are linked to the transaction and to the evidentiary record, but are not signed.

Save templates

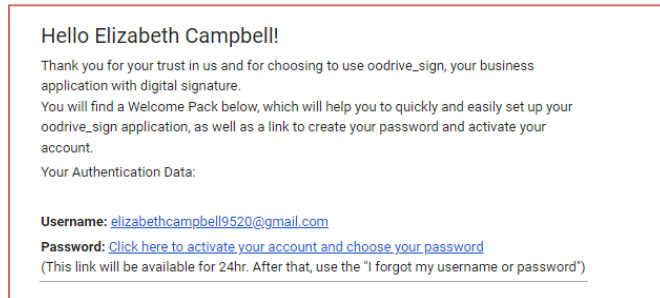Use your customized contract to create a contract template, saving you time in your future transactions.

Manage your contract activity

The "My contracts" section contains all your transactions, letting you monitor them in real time.

Manage your account

You can view and make changes to the information in your account, navigate through the signature platform, switch between permission groups (here: 'Human Resources') and log out of your session.

Add your documents

Add other documents and merge them with your main document. You can also choose the order in which the merged documents will appear.

Go to the next step

When you have finished a stage in creating your contract, click "Next" to go to the next step.

Interface screenshot

oodrive sign — Upload the document to be signed

🏠 My contracts Campaigns 🔔 Elizabeth Campbell — Human Resources

STEP 1 Contract and annexes

STEP 2 Customize your contract

STEP 3 Manage signatories

STEP 4 Signatures

2022 - EMPLOYMENT CONTRACT.PDF ✏️

100 % ⊖ ⊕ ✋ 🔍 ⚙️

oodrive sign

Contract of employment for an indefinite period
Ready for electronic signature with Oodrive Sign
Try me on
https://www.sellandsign.com/fr/formulaire-de-demande-dessai-gratuit/

BETWEEN THE UNDERSIGNED :

The Company Oodrive Test TW   S.A with a capital of
1 111 111 €, whose registered office is located at Rue de La Pinède 13007 MARSEILLE CEDEX.
SIRET NUMBER : 124545454888328
URSSAF NUMBER : 111 222223332

ON THE ONE HAND,

AND

REORGANIZE YOUR DOCUMENTS

2022 - Employment contract.p... ✕
88 Ko

IT Policy.pdf ✕
369 Ko

➕ Add PDF documents
Max. size: 50 MB

ⓘ Add additional documents to merge

➕ See annexes   💾 Save as template   **Next**

Log in to Oodrive Sign

First login:

1. Retrieve the credentials emailed to you when your account was created.

2. Click the link **Click here to activate your account and choose your password**.

> Hello Elizabeth Campbell!
>
> Thank you for your trust in us and for choosing to use oodrive_sign, your business application with digital signature.
> You will find a Welcome Pack below, which will help you to quickly and easily set up your oodrive_sign application, as well as a link to create your password and activate your account.
> Your Authentication Data:
>
> **Username:** elizabethcampbell9520@gmail.com
> **Password:** Click here to activate your account and choose your password
> (This link will be available for 24hr. After that, use the "I forgot my username or password")

3. Your browser opens a page asking you to set a password and to confirm it before clicking **Validate**.

4. Once you are redirected to the login page, enter your username and password, then click **Log in**.

After the first login:

1. Retrieve the credentials emailed to you when your account was created.

2. In your web browser, go to the login page for your signature platform: https://sign.oodrive.com

3. Enter your username and password, then click **Log in**.

If you have forgotten your password, click **Forgot password?**

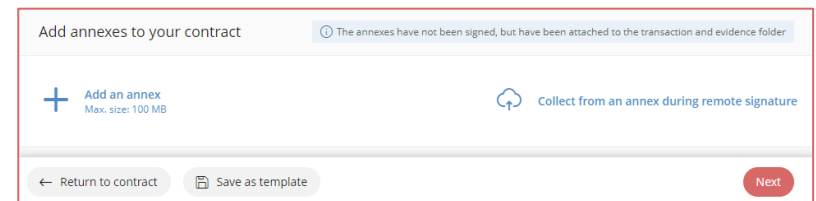# ❶ Upload the contract requiring signature

1. On the home page, select **Sign a document**.

> **Sign a document**
> Click here to have a single contract signed with or without annexes
> ⊕ Import a document
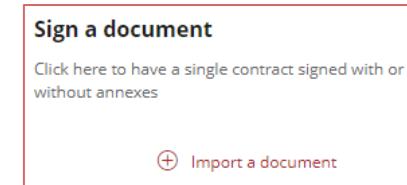
2. Click **Add documents**.

3. Browse through the file explorer on your computer and select the document requiring signature. For optimal quality, we recommend that you import a PDF document.

   If you select several documents, they will be merged.

4. If you want to add annexes and/or collect them from your signatory, click **See annexes**.

   - **To add an annex**, click **Add an annex** and upload your chosen document.

   > Add annexes to your contract   ⓘ The annexes have not been signed, but have been attached to the transaction and evidence folder
   >
   > ╋ Add an annex   ☁ Collect from an annex during remote signature
   >   Max. size: 100 MB
   >
   > ← Return to contract   🖫 Save as template   Next

   - **To collect an annex from a signatory**, click **Collect from an annex during remote signature**.

     Next, enter the information for the collection (name, size, and number of files, required or non-required status) and click **Approve**.

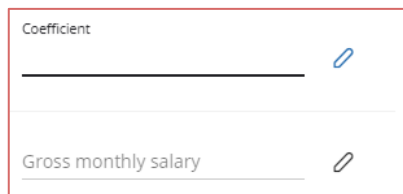5. Click **Next** to move to the next step.

② Customize your contract

If the contract you have uploaded contains Smartfields® (fields used for collecting variable content), you can customize your contract by entering their values yourself, or by collecting the required information from a remote signatory.

Step 1: Enter the Smartfields®

You can choose to complete some or all of the Smartfields® in the contract yourself without using remote collection, especially when signing face to face.

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

2. If you have completed all of the Smartfields® required for the transaction, click **Next**.

   Otherwise, go to the next step to collect information from a remote signatory.

Step 2: Collect information from a signatory
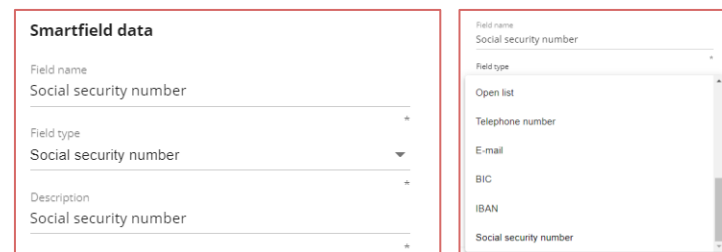
If your transaction includes at least one remote signatory, you can collect information from that signatory.

Note: If the transaction includes several remote signatories, the first one to sign the contract must complete the Smartfields®.
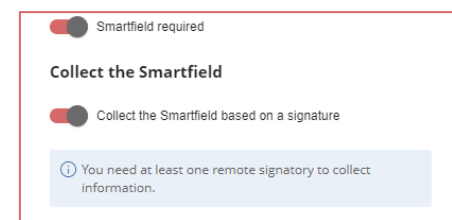
1. Browse the right-hand panel and click the ✎ icon to edit a Smartfield®.

2. Specify the required data type. To do this, you can:

   • Edit the **Description** for the field (in other words, the title under which it is presented to the signatory),

   • Specify the required data type for this field (text, date, number, multiple choice, IBAN, social security number, etc.).

3. Enable the **Collect the Smartfield based on a signature** setting**.**

   If the Smartfield® is required, also enable the **Smartfield required** setting.

4. When you have finished, click **Approve**.

5. Repeat the previous steps as many times as necessary to configure the other Smartfields® that need to be collected from a signatory.

   Tip: Once you have finished customizing your contract, you can save it by clicking **Save as template**. By doing so, you will be able to keep this version for future use and share it with colleagues.

6. When you have finished, click **Next**.

③ Manage signatories

Add a pre-approver

1. In the side panel, click the (**+**) sign to the right of the **Pre-approver** section.

2. Select the person who needs to pre-approve your contract from the signatory directory, then click **Next**.

   Note: If that person is not yet in the directory, you can click **Create a new pre-approver** to add them.

3. In the **Select Signatories** window, enable the **Add this signer in prevalidation mode (not signer)** setting**.** If you want to notify the pre-approver by SMS, enable the corresponding setting.

4. Click **Apply**.

5. Repeat the previous steps as many times as necessary to add other pre-approvers to your contract.
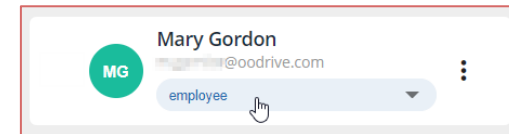
Add signatories

1. In the side panel, click the (**+**) sign to the right of the **Signatory** section.

2. Select the signatory for your contract from the signatory directory, then click **Next**.

   Note: If the signatory is not yet in the directory, you can click **Create a new signatory** to add them.

3. In the **Select signatories** window, select a signature mode among those available.
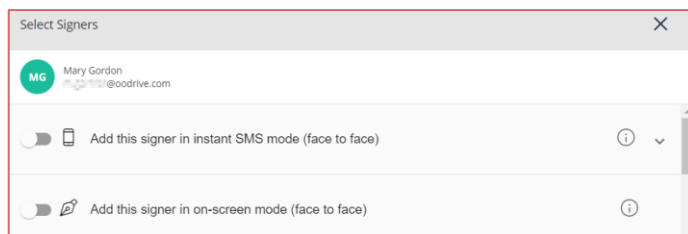
4. When you have finished, click **Apply**. The signatory is added to your transaction.

If your document for signature contains customized signature boxes, select the signatory's role using the drop-down list under their name.

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

6. If you want the signatories to sign in a specific order, activate the **Define a signature order** option, then drag and drop the name blocks to arrange them into the order of your choice.

7. If you want reminder notifications to be sent automatically to your signatories, select a chase-up policy above the list of signatories.

8. To start with the signing process, perform one of the following actions:

   - **For a remote signature**, click the **Send** button twice to confirm that you want to send the contract for signature.

   - **For a face-to-face signature**, click the **Sign** button, then go on to the signature step. If you have set several signatories, get them to sign one by one by selecting their names from the panel on the right.

When you have finished, a message confirms that your document has been sent/signed.

Click **Check my contract** to monitor the progress of your transaction.

④ Monitor your contract activity

You can manage your contracts and track your contract activity in real time in the **My contracts** section, which you can find in the upper-right corner of the screen:
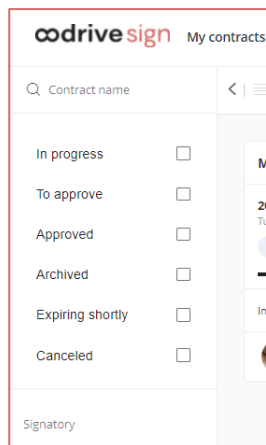

Find a contract

1. To find your contract, enter the contract name in the search bar above the filters in the left-hand panel.

2. You can refine your search by filtering your contracts by:

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

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

## Monitor your contracts

1. Click on a transaction to see its details and view all the contract information.

2. You can perform the following actions from the detailed view:

   - Modify a contract, its information, and view the contract history log.
   - Download the documents related to the transaction.
   - View the list of signatories, modify a signatory and/or their signature mode, and resend the notification email.
   - Countersign (if you are a manager) or cancel the transaction.

⑤ Countersign your contract

Once all the signatories have signed the contract, it must be countersigned to ensure its legally binding and conclusive status. Only managers can countersign a transaction on behalf of your legal entity.

If you are a manager

1. Go to the **My contracts** section in the upper-right corner of the screen, then check the **To approve** filter in the left-hand panel.

2. Click the contract you wish to countersign to display its details.

3. Verify the contract information, and click **Approve**, then **OK**.
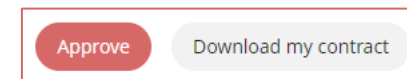
Once the document has been countersigned, you can click **Download my contract** to download the final version of it.

If you are not a manager

You need to wait for the manager's countersignature before you can receive the signed and approved version of your documents. Once the contract has been countersigned, you will receive an email notification informing you that the contract is available for download.

1. Check your inbox and look for an email entitled **Your finalized contract**.

2. Open the email and click **Download your validated contract** to download the version that has been signed and countersigned.