User Guide

Oodrive Sign

Terms of use

Distribution list

Company	Role
Oodrive Group	Oodrive Group colleagues and customers

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1. Getting started with Oodrive Sign

1.1. Log in to your workspace

There are three ways to log in to your workspace:

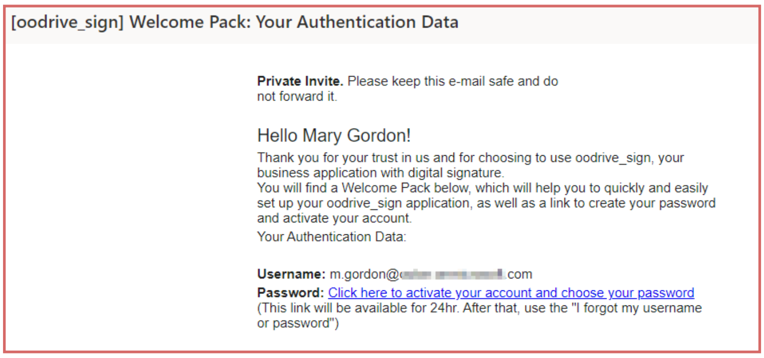
- with your Sign login credentials
- with your Oodrive login credentials
- with your company login credentials (if your company has signed up to this service)

Log in with your Sign login credentials.

Logging in for the first time

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**.



[oodrive_sign] Welcome Pack: Your Authentication Data

Private Invite. Please keep this e-mail safe and do not forward it.

Hello Mary Gordon!

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: m.gordon@[redacted].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. You will be redirected to a browser page asking you to set a password and confirm before clicking **Validate**.

4. Once on the login page, enter your username and password, then click **Connection**.

   Tip: We recommend that you add the Oodrive Sign login page to your browser bookmarks to make it easier to find next time you log in.

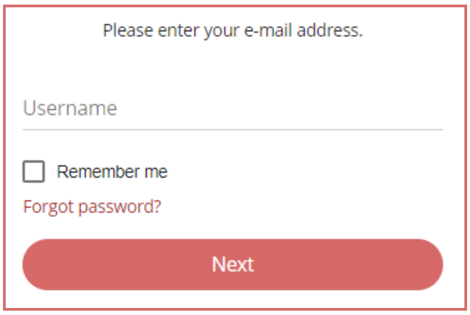
Log out at any time by clicking on your name in the upper-right corner of the page, then **Logout**.

Subsequent logins

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, then your password.



   If you want the browser to remember your login credentials, tick the **Remember me** box.

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

4. Click **Connection**.

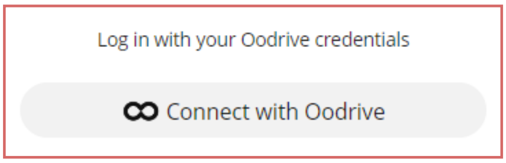
Log out at any time by clicking on your name in the upper-right corner of the page, then click **Logout**.

Log in with your Oodrive login credentials

1. In your web browser, go to the login page for your signature platform:

   https://sign.oodrive.com/

2. Click **Connect with Oodrive**.



   If you have already logged in to the Oodrive platform, connection to Oodrive Sign will be automatic. If not, you will need to enter your login credentials.

3. Enter the name of your workspace, then click **Ok**.

4. Enter the username and password you use to log in to your Oodrive applications, then click **Log in**.

Log out at any time by clicking on your name in the upper-right corner of the page, then click **Logout**.

Log in with your company login credentials

If your company has signed up to this service, you can log in to your Oodrive Sign license using your company login credentials.

1. Use the personalized link you have received to access the dedicated login page for your company.

   Tip: We recommend that you add this personalized login page to your browser bookmarks to make it easier to find next time you log in.

2. Log in using your company login credentials.

   If you have already logged in to other solutions using your company login credentials, connection to Oodrive Sign will be automatic.

Log out at any time by clicking on your name in the upper-right corner of the page, then **Logout**.

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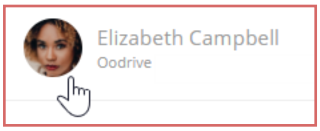
1.2. Overview of Oodrive Sign

Overview of your license

Your Oodrive Sign license is the independent environment assigned to your company on the signature platform.

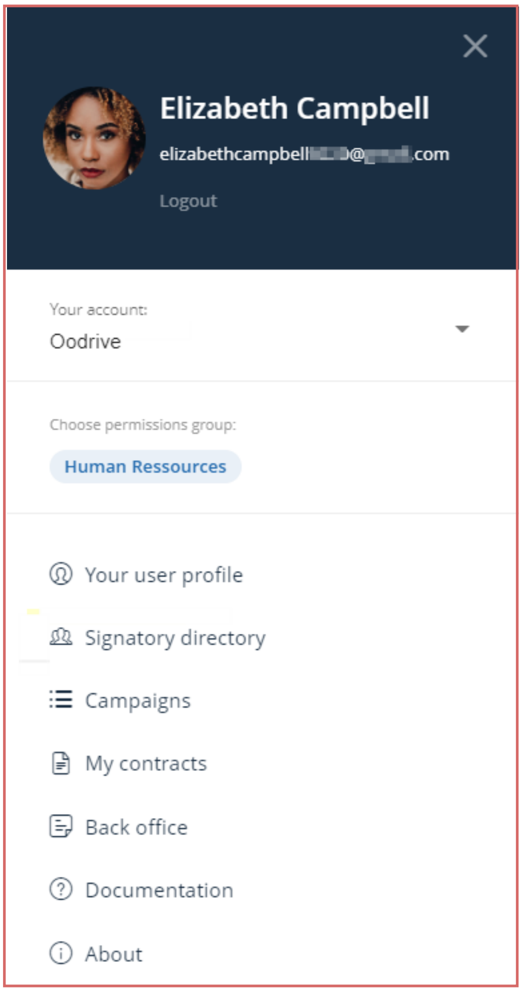
Every company using the Oodrive Sign solution is assigned one or more licenses, each of which covers the contractual activity for one legal entity.

You can quickly access all sections of your license in the navigation panel that appears when you click your profile:



In the navigation panel, you can access the main sections of your license:

- Your user profile
- The signatory directory
- Your campaigns
- Your "My contracts" dashboard



Navigate between several permissions groups

Your Administrator may have chosen to divide your organization’s contractual activity into partitioned units known as “permissions groups” for greater confidentiality. Each user will only have access to the permissions groups assigned by the Administrator.

If several permissions groups have been assigned to you, you can navigate between them to access the contract templates, the signatory directory and the contractual activity for each permissions group.

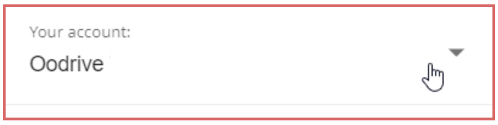
1. Click the icon to go to the home page.
2. Click your profile in the upper-right corner of the screen.
3. In the side menu, click **Choose permissions group**.
4. Use the drop-down list to select the permissions group you wish to enter.
5. Click **Approve**.

You access the home page for the selected permissions group. New contracts, campaigns and signatories that you will create will be associated with this permissions group.

Navigate between several licenses

If you are affiliated to several legal entities, you can navigate between them by switching from one license to another.

1. Click your profile in the upper-right corner of the screen.
2. In the navigation panel, click the **Your account** drop-down list and select the license you want to go to.

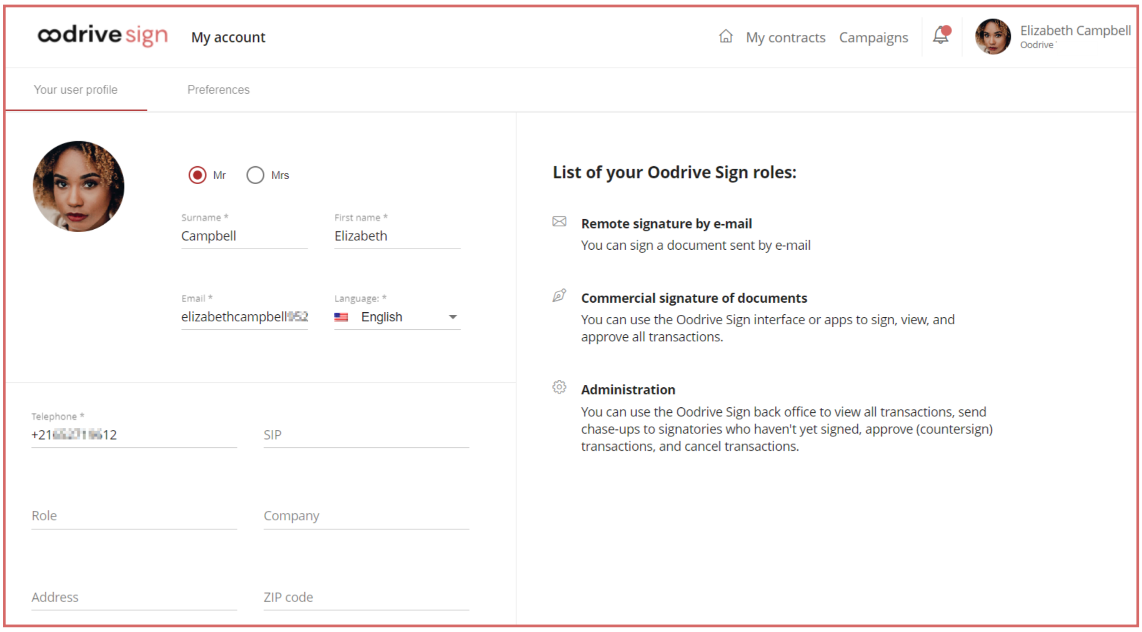


This redirects you to the dashboard for the selected license.

1.3. Edit your user profile

You can edit your personal information or preferences at any time from your user profile.

1. Click your profile in the upper-right corner of the screen.
2. In the navigation pane, select **Your user profile**.
3. You can then see the details of your user account:

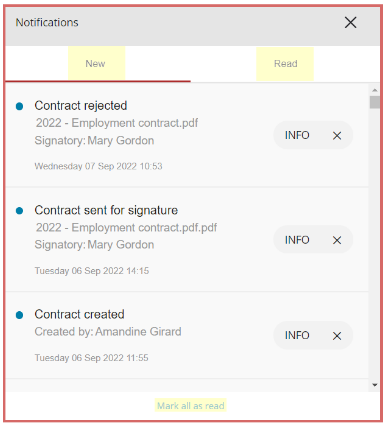


4. Edit your personal information from the **Your user profile** tab.
5. If you want to make changes to your account settings, go to the **Preferences** tab. There, you can perform operations such as managing your preferences for email notifications and conversation tracking.

1.4. Manage your notifications

1. Click the bell icon next to your profile in the upper-right corner of the screen:  .

2. You will see your new notifications.



3. Click **INFO** to access the details of the transaction that generated a particular notification.

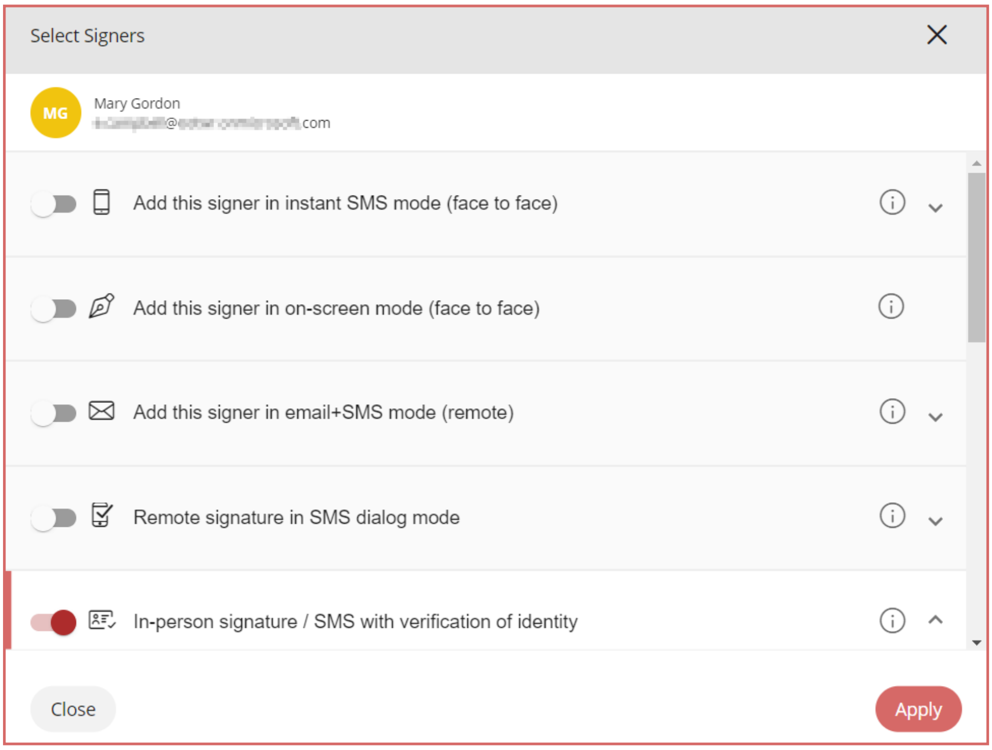
4. To mark a notification as read and remove it from the list of new notifications, click the small cross to its right. It will then move to the **Read** tab.

   You can also click **Mark all as read** to hide all new notifications in a single click.

1.5. Overview of signature modes

Oodrive Sign offers different electronic signature modes with or without identity verification. This section introduces the various signature modes you can select for your signatories while preparing a transaction.

Please note that the available signature modes depend on the services to which your organization has subscribed, as well as on the configuration of your license and the contract templates used.



Face-to-face signature

Face-to-face signature is used for face-to-face transactions where the signatory is sharing the same screen as you and can therefore read through the contract on your screen before signing.

Two face-to-face signature modes are available:

- **On-screen mode**: In this mode, the signatory signs directly on the screen of your tablet or smartphone. This procedure allows you to obtain a legally binding and conclusive electronic signature for your contracts, with or without a network connection, from the mobile application.
- **Instant SMS mode**: In this mode, the signatory signs by means of an OTP code received by SMS text. This signature mode is preferable if you are face to face with your customer and have access to your computer and an internet connection.

Remote signature

Remote signature gives signatories access to the contract via an email or SMS text notification so that they can check and sign it at a time of their choice. It is particularly useful in situations where you are not able to meet face to face, or when a signatory is traveling.

Several remote signature modes are available:

- **Remote approval**: In this mode, the signatory receives an email containing a link that lets them check and then approve the contract. Because of the lack of identity verification, this signature mode has little legal validity, but it can be useful in cases such as having documents approved internally.
- **Email+SMS mode**: In this mode, the signatory receives an email containing a link that lets them check and then sign the contract via a code received by SMS.
- **Remote signature in SMS dialog mode**: In this mode, the signatory receives an SMS containing a link that lets them check the contract. To sign it, the signatory must reply to a second SMS containing a code, repeating the same code in their reply.
- **Remote signature with verification of identity**: In this advanced signature mode, the signatory receives an email containing a link that lets them check the contract and then sign it via a code received by SMS, after having verified their identity.

  Two levels of identity verification are available:

  - **AES 2 - Verification of an original identity document**

    The signatory must make a video recording of their identity document to confirm its authenticity.

  - **AES 3 - Verification of an original identity document and the presence of the signature**

    The signatory must make a video recording of their identity document to confirm its authenticity, then record their face to provide proof of life.

- **Qualified remote signature with dongle**: In this signature mode, a signatory with a certificate on USB key can make a qualified signature.

2. Having a document signed

You can have a document signed by one or more signatories.

Please note: There are several steps to the process of creating a contract and sending it for signature, but you can pause the process at any time. You can then go back to your draft in the **My contracts** section to continue creating it where you left off.

2.1. Step 1: Upload the contract

This step consists in uploading the document for signature. If contact templates are already available for your Oodrive Sign license, you can also choose a template for your home page and go directly to the next step.

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

2. Click **Add documents**.

3. Browse through the file explorer on your computer and select the PDF document(s) requiring signature.

   Please note:

   - The total file size must not exceed 50 MB.
   - If you select several documents, they will be merged.
   - For optimal results, we recommend that you import your files in PDF format.

   Tip: If you'd like, you can use the side panel to add other documents to your transaction and merge them. You can also drag and drop the documents to set the order in which they will appear.

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.
   - **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.

2.2. Step 2: Customize the contract

If the contract you need to have signed contains Smartfields® (fields 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: Complete 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.

   Tip: To see the information you have entered appear on the contract preview, click the banner with the message "**The document is out of date. Click here to refresh it**".

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.

Please note: If the transaction includes several remote signatories, the first one to sign must complete the Smartfields®.

1. Browse the panel on the right and click the 🖉 icon to edit a Smartfield®.

2. Specify the required data type. To do this, you can:
   - Edit the **Field name** (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 essential to the transaction, 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 you need to collect from a signatory.

   Tip: When your configuration work is complete, you can choose to create a template from your customized contract by clicking **Save as template**.

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

2.3. Step 3: Define the signature process

Add pre-approvers

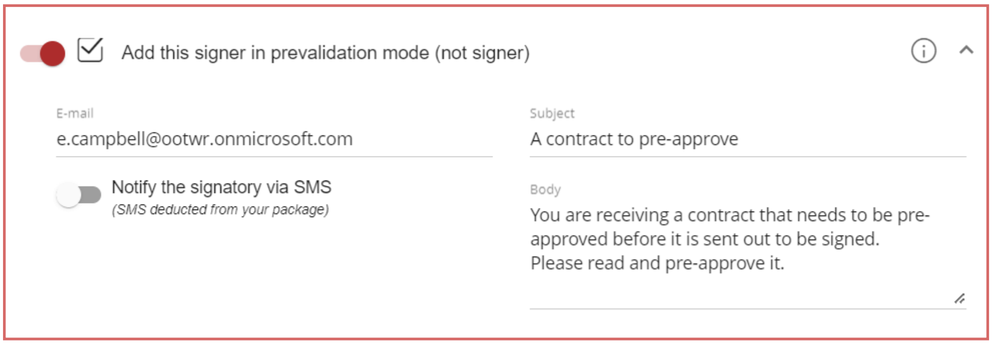
Pre-approvers are individuals (often colleagues from the same company) who will each receive an email, one after another, to pre-approve the contract before it can be sent to remote signatories.

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 in the directory, you can click **Create a new pre-approver** to add them.

3. In the **Select signatories** window, enable the **Add this signatory in pre-approval mode** setting. If you want to notify the pre-approver by SMS, enable the corresponding setting.

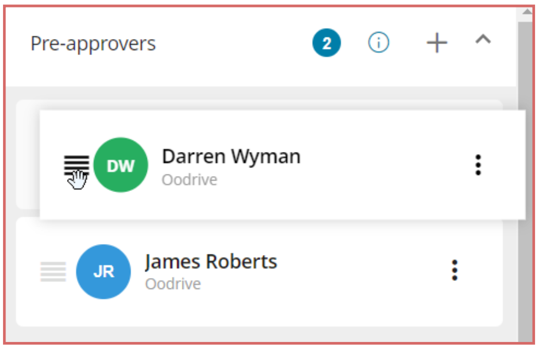


   You can also choose to customize the email subject line and body.

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

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

6. If you have chosen to add several pre-approvers, you can drag and drop the name blocks into the **Pre-approvers** section to define the order in which they will be involved:



Copy in recipients

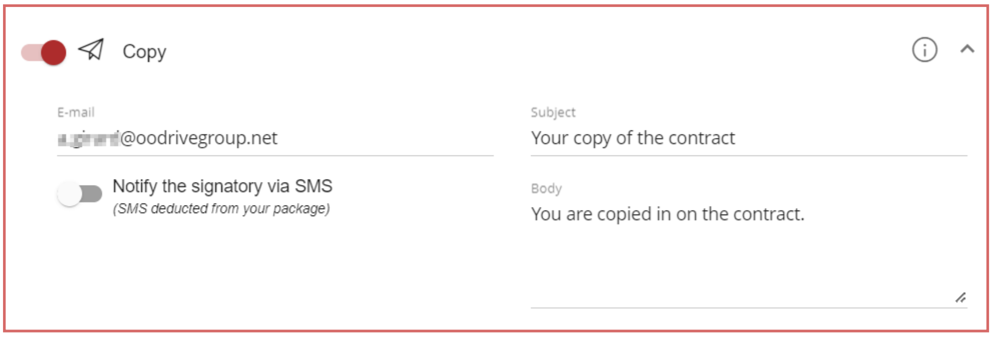
Copied-in recipients receive a copy of the emails sent as part of the transaction for information purposes, but are not involved.

1. In the side panel, click the **+** sign to the right of the **In copy** section.

2. Select the person who needs copying into your transaction from the signatory directory, then click **Next**.

   Note: If that person is not in the directory, you can click **Create a new copy recipient** to add them.

3. In the **Select signatories** window, enable the **Copy** setting. If you want to notify the recipient by SMS, enable the corresponding setting.



You can also choose to customize the email subject line and body.

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

5. Repeat the previous steps as many times as necessary to copy in other recipients.

Add signatories

Step 1: Add the 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**.

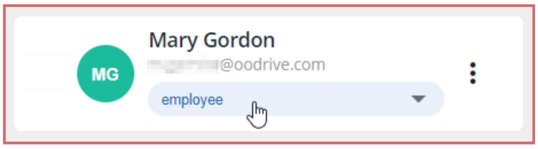
   Note: If the signatory is not yet in the directory, you can click **Create a new signatory** to add them.

3. In the **Select signatories** window, select a signature mode.

   You can choose from various signature modes:

   - Face-to-face signature
   - Face-to-face signature + SMS
   - Remote signature + email / SMS
   - Remote signature in SMS dialogue mode
   - Remote signature with identity verification
   - Qualified remote signature with dongle

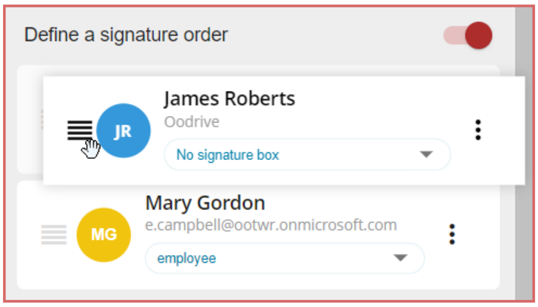
4. When you have finished, click **Apply**. Your signatory is added to the transaction:



   If your document for signature contains customized signature boxes, select the signatory role in the drop-down list below their name.

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

6. If your transaction includes several signatories, you can define the order in which they will sign. To do so, enable the **Define a signature order** option, then drag and drop the name blocks to arrange the signatories into the order of your choice.



7. If you have the Manager role (a user with the ability to approve transactions) and you wish to enable automatic counter-signature, enable the **AUTO** parameter opposite the **Countersignature** tag.

   The contract will be automatically approved and counter-signed once the signature process is complete.

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

9. Once your signatories have been added, perform one of the following actions:
   - **If at least one signatory is remote**, click **Send** twice to confirm that you want to send the email for signature.
   - **If the signature is face to face only**, click **Sign**, 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 side panel.

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.

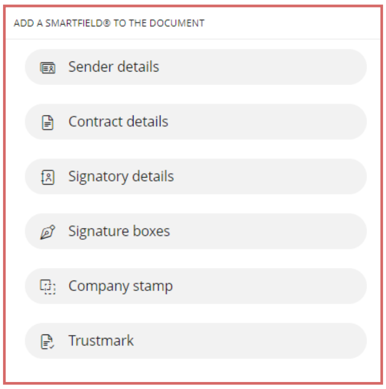
Step 2: Place additional Smartfields

If your Administrator has enabled this option, once signatories are added to the bundle you will have the ability to add additional standard Smartfields to your contracts, including signature pads and initials or signatory information.

1. After adding the signatories, click **Edit Document**.

   Please note: This button is only available after you've added at leat one signatory to your contract.

2. The contract opens in edit mode and the side panel displays a selection of standard Smartfields that you can place on your contract:



3. Click on a section to display the available Smartfields and place them in the contract:

   - **Sender details**

     Select the information you want to display and click **Add**.

     - Given name
     - Surname
     - Company
     - Job title
     - Address
     - ZIP code
     - Town/City
     - Country
     - Smartfield(s) specific to your license, if any

   - **Contract details**

     Select the information you want to display and click **Add**.

     - Signed on (date)
     - Signed in (location)

   - **Signatory details**

     Select a signatory first, then select the information to display and click **Add**.

     - Title
     - Full name
     - Given name
     - Surname
     - Company
     - SIRET
     - Address
     - Address
     - ZIP code

- Town/City
- Place of birth
- Cell

(cont.)

- Country
- Job title
- Tel.
- Date of birth
- Email
- Smartfield(s) specific to your license, if any

- **Signature box**

  Select a signatory first, then choose the field type (signature pad or initials) and click **Add**.

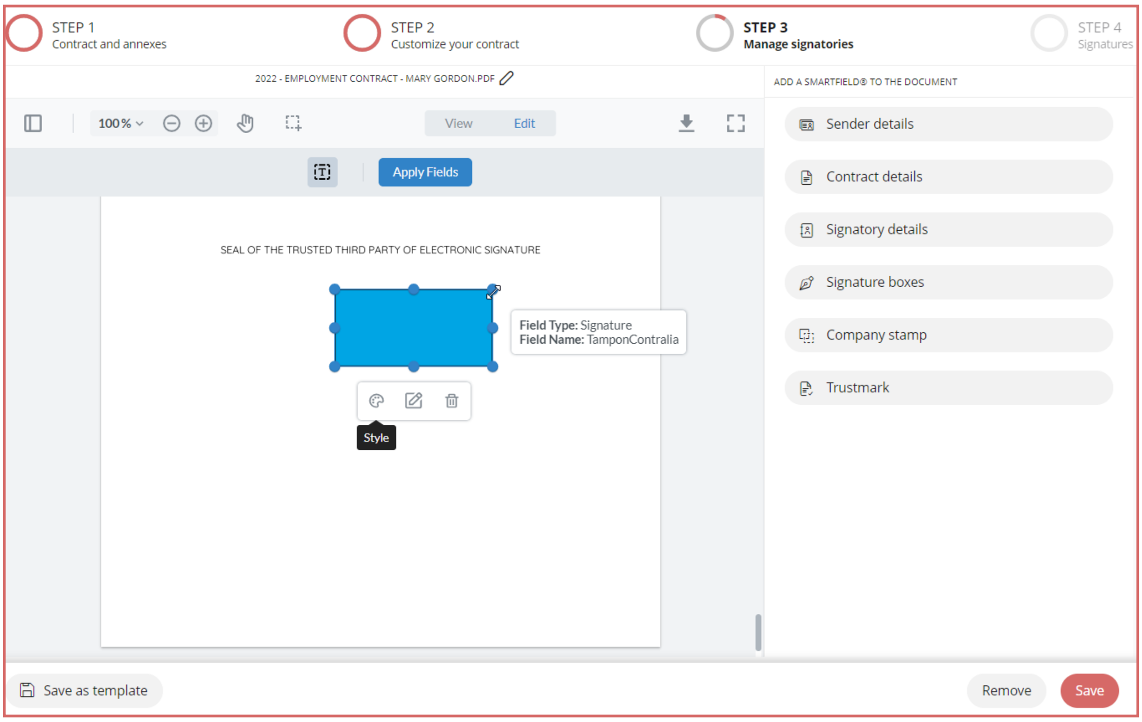
- **Company stamp**

  The field dedicated to the company stamp is immediately displayed on the contract.

- **Trustmark**

  The field dedicated to the trust seal is displayed immediately on the contract.

4. The selected Smartfield is added to your contract and appears in the form of a blue rectangle.



Drag and drop the Smartfield to move it to the location of your choice on the document. You can also change the size and shape of the Smartfield by stretching its outline.

5. Repeat the previous steps as many times as necessary to add other Smartfields.

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

Your Smartfields are now displayed on the contract. As these are standard Smartfields, they will be filled in automatically.

Step 3: Automate contract management and send it for signature

Before sending the contract for signature, you can choose to automate the countersignature process as well as the sending of reminders to signatories.

1. If you have the Manager role (a user with the ability to approve transactions) and you wish to enable automatic counter-signature, enable the **AUTO** parameter opposite the **Countersignature** tag.

   The contract will be automatically approved and counter-signed once the signature process is complete.

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

3. When you have finished, perform one of the following actions:
   - **If at least one signatory is remote**, click **Send** twice to confirm that you want to send the email for signature.
   - **If the signature is face to face only**, click **Sign**, 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 side panel.

3. Having a binder signed

Binders let you group several contracts you want to have signed through a single consent effort. This procedure allows your signatories to give their consent in one single operation, thus avoiding repetitive signature processes.

The advantages of binder signature are as follows:

- You'll simplify the multi-contractualization process for your signatories and be more productive
- You'll save your signatories time by avoiding repetitive signature processes
- You'll ensure that all documents for a folder are properly signed and compliant

Be aware that even if a binder is signed in one single consent effort by signatories, the result will be an individual document signed for each of the contracts comprising the binder.

Please note: There are several stages to the process of creating a binder and sending it for signature, but you can pause the process at any time. You can then go back to your draft in the **My contracts** section to continue creating it where you left off.

3.1. Step 1: Create the binder

This step consists in uploading the documents for signature.

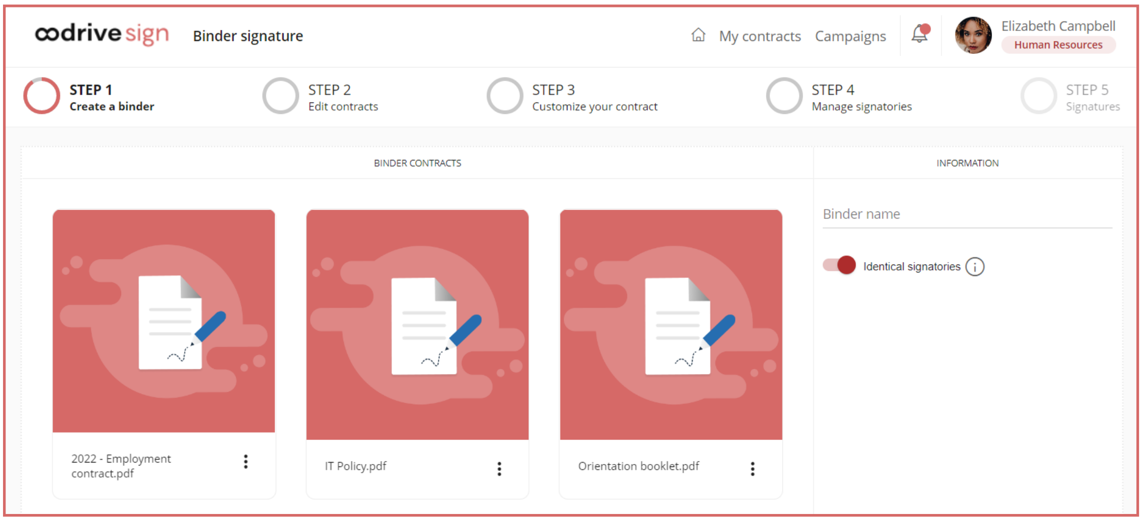
1. From the home page, select **Binder signature**.

2. Click **Add contracts to the binder**.

3. Browse through the file explorer on your computer and select the documents requiring signature.

   Please note: Because the number of documents in a binder is not limited, you can upload as many contracts as you want. However, the size of each contract is limited to 50 MB.

4. The contracts are added to the binder:



If you want to modify the uploaded documents, click the three dots to the right of the name of each document to rename or delete it. You can also name your binder in the **Binder name** field.

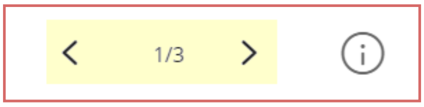
5. By default, the system assumes that the binder signatory(ies) are the same for all contracts. If this is not the case, disable the **Identical signatories** setting.

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

3.2. Step 2: Edit the contracts

This step allows you to view the contracts for your binder and add to them by uploading annexes or merging documents.

1. Display the contract you want to manage, using the navigation arrows at the bottom of the screen.



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

    - **To add an annex**, click **Add an annex** and upload your chosen document.
    - **To collect an annex from a remote 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**.

    Click **Return to contract** to leave the annex view.

3. If you'd like, you can use the side panel to add other documents to your transaction and merge them. You can also drag and drop the documents to set the order in which they will appear.

4. Repeat this procedure as many times as necessary to manage the various contracts your binder contains.

5. When you have finished, click **Next** to go to the next step.

3.3. Step 3: Customize the contracts

If at least one of your contracts contains Smartfields® (fields that allow you to collect variable content), you will access this customization step.

You can then customize the contract(s) by completing the values of the Smartfields® yourself, or by collecting the required information from a remote signatory.

Complete the Smartfields®

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

1. Use the navigation arrows at the bottom of the screen to display the contract containing the Smartfields® that you want to manage.

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

    Tip: To see the information you have entered appear on the contract preview, click the banner with the message "**The document is out of date. Click here to refresh it**".

3. 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.

Collect information from a signatory

If your transaction includes at least one remote signatory, you can collect information from that signatory.

Please note: If the transaction includes several remote signatories, the first one to sign must complete the Smartfields®.

1. Use the navigation arrows at the bottom of the screen to display the contract containing the Smartfields® that you want to manage.

   Browse the panel on the right and click the icon to edit a Smartfield®.

2. Specify the required data type. To do this, you can:
   - Edit the **Field name** 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 essential to the transaction, 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 you need to collect from a signatory.

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

3.4. Step 3: Define the signature process

Add pre-approvers

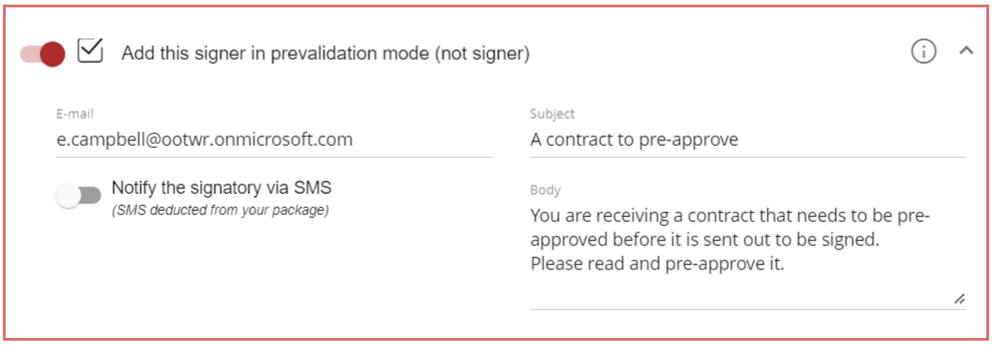
Pre-approvers are individuals (often colleagues from the same company) who will each receive an email, one after another, to pre-approve the contracts before they can be sent to remote signatories.

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 in the directory, you can click **Create a new pre-approver** to add them.

3. In the **Select signatories** window, enable the **Add this signatory in pre-approval mode** setting. If you want to notify the pre-approver by SMS, enable the corresponding setting.

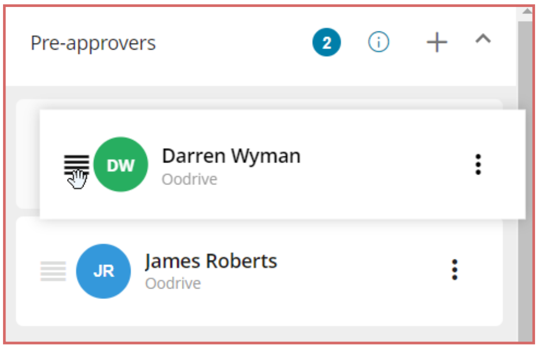


   You can also choose to customize the email subject line and body.

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

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

6. If you have chosen to add several pre-approvers, you can drag and drop the name blocks into the **Pre-approvers** section to define the order in which they will be involved:



Copy in recipients

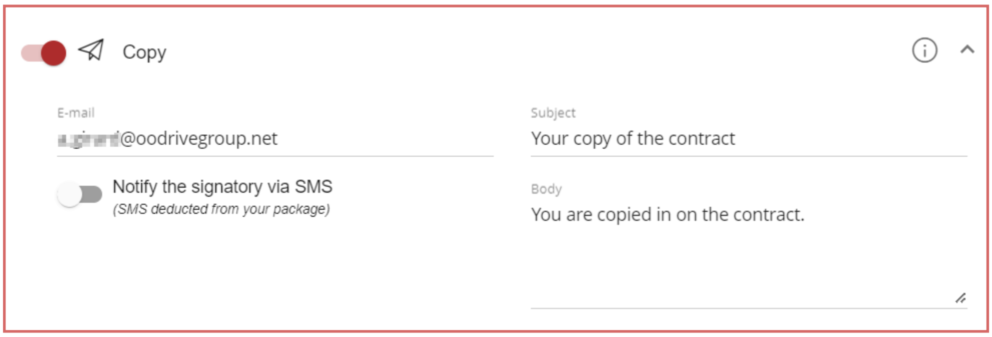
Copied-in recipients receive a copy of the emails sent as part of the transaction for information purposes, but are not involved.

1. In the side panel, click the **+** sign to the right of the **In copy** section.

2. Select the person who needs copying into your transaction from the signatory directory, then click **Next**.

   Note: If that person is not in the directory, you can click **Create a new copy recipient** to add them.

3. In the **Select signatories** window, enable the **Copy** setting. If you want to notify the recipient by SMS, enable the corresponding setting.

   You can also choose to customize the email subject line and body.

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

5. Repeat the previous steps as many times as necessary to copy in other recipients.

Add signatories

Step 1: Add the signatories

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

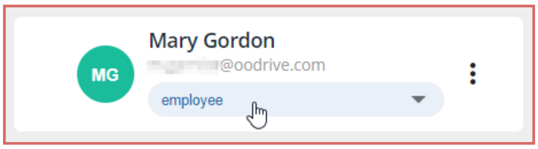
   If the signatories of the binder are not identical (as defined in step 1), an independent named **Signatory** section will be available for each contract in the binder.

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 one of the available signature modes:
   - Face-to-face signature
   - Face-to-face signature + SMS
   - Remote signature + email / SMS
   - Remote signature in SMS dialogue mode
   - Remote signature with identity verification
   - Qualified remote signature with dongle

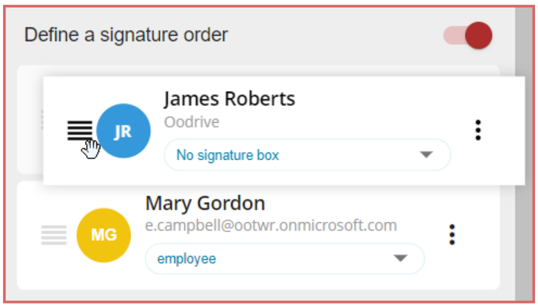
4. When you have finished, click **Apply**. Your signatory is added to the transaction:



   If your document for signature contains customized signature boxes, select the signatory role in the drop-down list below their name.

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

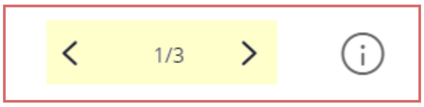
6. If your transaction includes several signatories, you can define the order in which they will sign. To do so, enable the **Define a signature order** option, then drag and drop the name blocks to arrange the signatories into the order of your choice.



Step 2: Place additional Smartfields

If your Administrator has enabled this option, once signatories are added to the bundle you will have the ability to add additional standard Smartfields to your contracts, including signature pads and initials or signatory information.

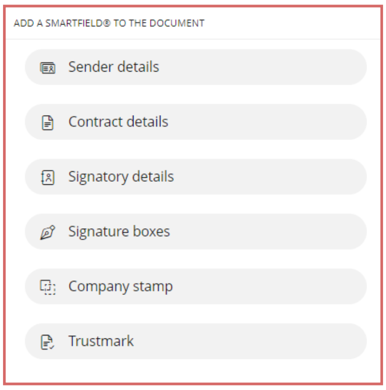
1. After adding the signatories, use the navigation arrows at the bottom of the screen to display the contract on which you want to place Smartfields .



2. Click **Edit Document**.

   Please note: This button is only available after you've added at leat one signatory to your contract.

3. The contract opens in edit mode and the side panel displays a selection of standard Smartfields that you can place on your contract:



4. Click on a section to display the available Smartfields and place them in the contract:

   - **Sender details**

     Select the information you want to display and click **Add**.

     - Given name
     - Surname
     - Company
     - Job title
     - Address
     - ZIP code
     - Town/City
     - Country
     - Smartfield(s) specific to your license, if any

   - **Contract details**

Select the information you want to display and click **Add**.

- Signed on (date)
- Signed in (location)

- **Signatory details**

  Select a signatory first, then select the information to display and click **Add**.

  - Title
  - Surname
  - Address
  - Town/City
  - Place of birth
  - Cell
  - Full name
  - Company
  - Address (cont.)
  - Country
  - Job title
  - Tel.
  - Given name
  - SIRET
  - ZIP code
  - Date of birth
  - Email
  - Smartfield(s) specific to your license, if any

- **Signature box**

  Select a signatory first, then choose the field type (signature pad or initials) and click **Add**.

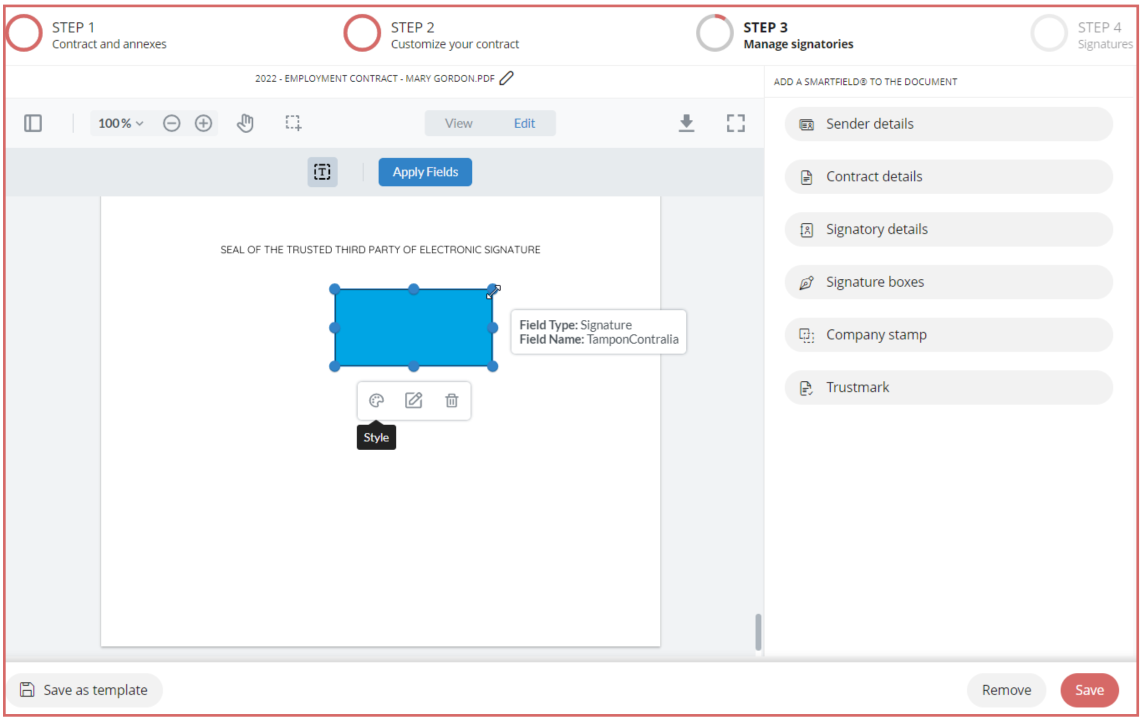
- **Company stamp**

  The field dedicated to the company stamp is immediately displayed on the contract.

- **Trustmark**

  The field dedicated to the trust seal is displayed immediately on the contract.

5. The selected Smartfield is added to your contract and appears in the form of a blue rectangle.



Drag and drop the Smartfield to move it to the location of your choice on the document. You can also change the size and shape of the Smartfield by stretching its outline.

6. Repeat the previous steps as many times as necessary to add other Smartfields.

7. When you have finished, click **Save**.

Your Smartfields are now displayed on the contract. As these are standard Smartfields, they will be filled in automatically.

Step 3: Automate contract management and send it for signature

Before sending the binder for signature, you can choose to automate the countersignature process as well as the sending of reminders to signatories.

1. If you have the Manager role (a user with the ability to approve transactions) and you wish to enable automatic counter-signature, enable the **AUTO** parameter opposite the **Countersignature** tag.

   Next, select the transactions for which you wish to enable automatic counter-signature:

   - **All**: all transactions in the binder
   - **Only one**: the transaction for the contract currently displayed on the screen

   The selected contracts will be automatically approved and counter-signed once the signature process is complete.

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

3. When you have finished, perform one of the following actions:

   - **If at least one signatory is remote**, click **Send** twice to confirm that you want to send the email for signature.
   - **If the signature is face to face only**, click **Sign**, 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 side panel.

When you have finished, a message confirms that your binder has been sent/signed. Click **Check the binder** to monitor the progress of your transaction.

4. Creating a signature campaign

A signature campaign is a group sending method that makes it possible to have contracts signed in bulk. This method allows you to have one or more documents signed by a large number of signatories via an automated system.

To do so, you must prepare a list of recipients in CSV or XLSX format and select either a shared contract or an archive containing contracts specific to each signatory. Oodrive Sign will use these elements to send all signature emails on the date and time of your choice.

This group sending method is particularly useful when you need to transfer contracts to a large number of signatories.

4.1. Step 1: Initiate the campaign

You can choose between two distinct campaign modes, depending on whether your signatories all need to receive the same contract, or different contracts. Two campaign modes are available for this purpose.

- **Create a campaign based on a document or a template**: You can upload a PDF document or use a contract template that will be signed by all campaign recipients.
- **Create a campaign based on multiple documents**: You must prepare an archive containing all of the documents you want the recipients of the campaign to sign.

Create a campaign from a document or a template

1. On the home page, select **Create a campaign**.
2. Click **Create a campaign based on a document or a template**.
3. Perform one of the following actions to add the contract for signature:
    - **To upload a contract from your computer:** Click **Add PDF documents**, then browse the file manager and select the PDF document for signature.
    - **To select a template:** Click **Choose an existing template** and select one from the available templates. You can use the search bar to find your chosen template more easily.
4. Click **Next**.

Create a campaign from several documents

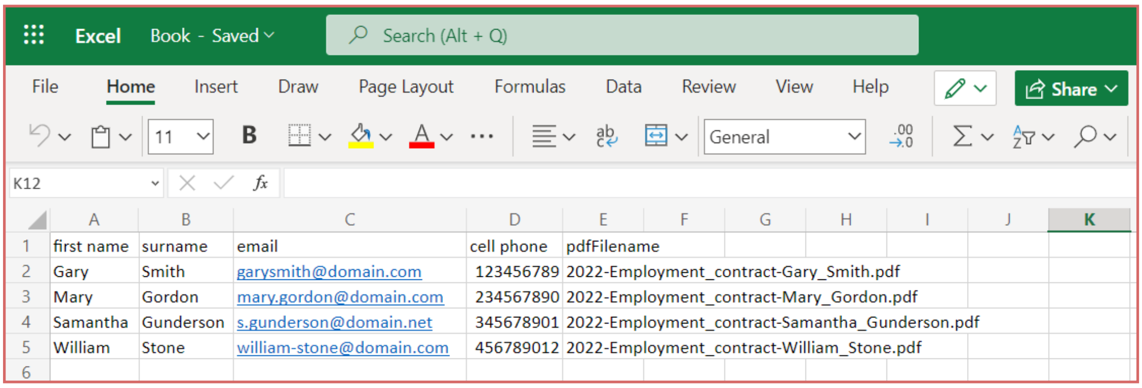
1. On the home page, select **Create a campaign**.
2. Click **Create a campaign based on multiple documents**.
3. Click **Add your ZIP**, then browse the file explorer on your computer to select the .zip archive containing the contracts for signature.
4. Click **Next**.

4.2. Step 2: Upload the signatories

1. Click **Download an example .csv file** or **Download an example .xls file** to download an import template.

   The downloaded template will vary depending on the campaign type and the Smartfields® contained in the selected contract or template.

2. Open the file and use the pre-filled examples provided in each column to complete each line with the information required for each of your signatories.

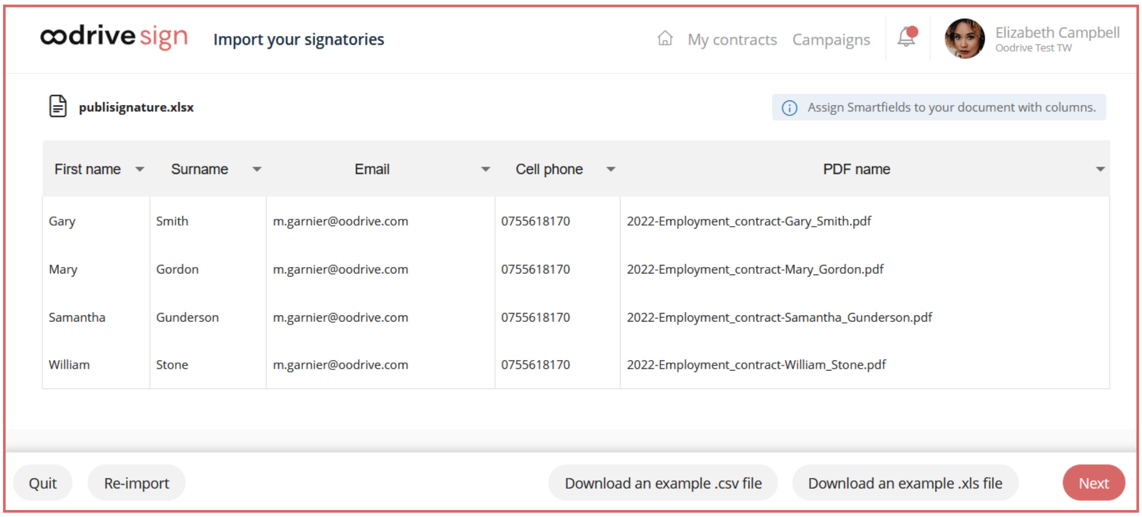


	A	B	C	D	E
1	first name	surname	email	cell phone	pdfFilename
2	Gary	Smith	garysmith@domain.com	123456789	2022-Employment_contract-Gary_Smith.pdf
3	Mary	Gordon	mary.gordon@domain.com	234567890	2022-Employment_contract-Mary_Gordon.pdf
4	Samantha	Gunderson	s.gunderson@domain.net	345678901	2022-Employment_contract-Samantha_Gunderson.pdf
5	William	Stone	william-stone@domain.com	456789012	2022-Employment_contract-William_Stone.pdf

3. Once the file has been completed—and you have made sure to fill in all the required columns and any Smartfields® present in your contract—save the file on your computer.

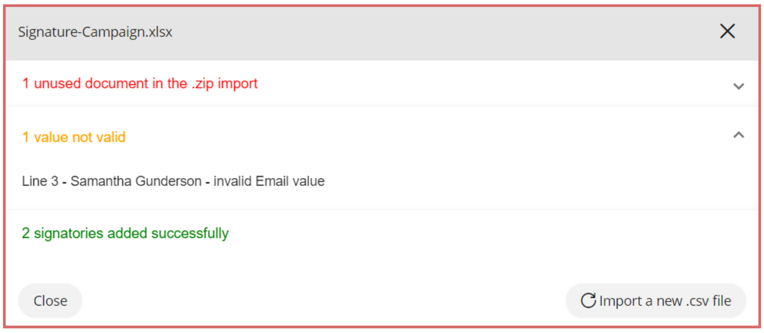
4. Go back to your browser and click **Import your file containing signatories in .csv or .xls format** to select the file saved on your computer.

   An import summary appears on your screen, so that you may check that your signatories' data is consistent:



   If you see that the automatic interpretation of columns by Oodrive Sign is not as you expected, click the title of a column to edit the associated field.

   In addition, if errors occurred during import, the fields in question will be highlighted in red and the **See errors** button will give you a detailed report to assist you in identifying and correcting them. If necessary, you can click **Import a new .csv file** to reimport your corrected import file.



5. Once the import has been successfully completed, click **Next**.

4.3. Step 3: Launch the campaign

1. Select your chosen signature mode for your signature campaign.

   Please note: Some remote signature modes allow you to modify the subject and body of the email notification sent to your signatories, and to define a campaign launch date by enabling the **Delay sending documents** setting.

2. When you have finished, click **Apply**. A summary of signatories is shown on the screen.

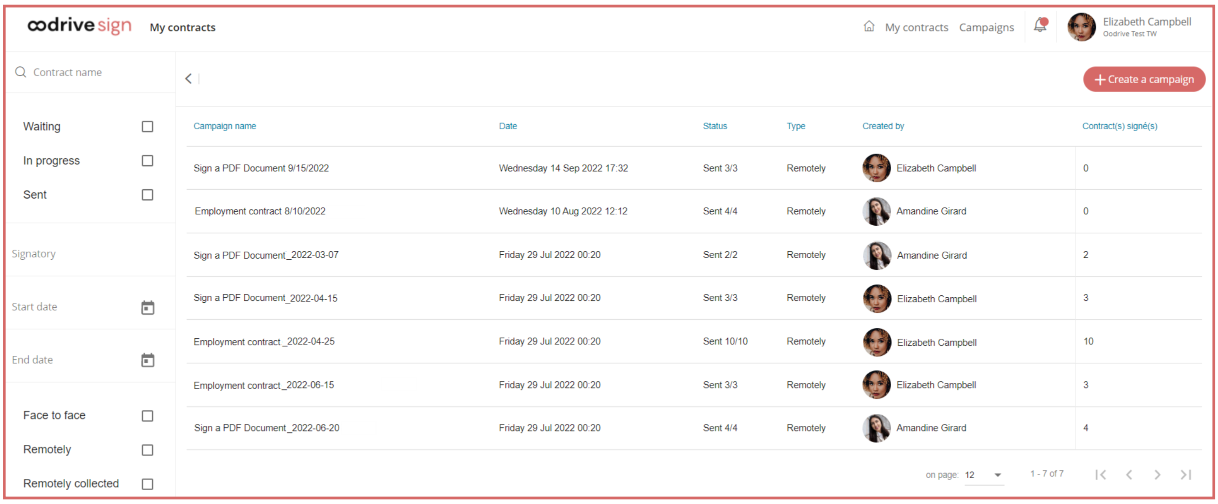
3. Click **Launch campaign** to allow Oodrive Sign to create the associated transactions.

   This step can take several minutes, depending on the number of transactions being processed, and will not start until the selected date in the case of delayed sending. To return to your activities on the signature platform without waiting, click **Close and continue in background**.

A confirmation message appears on the screen, informing you that the campaign is being published. You can click **Follow my campaign** to track your campaign.

4.4. Step 4: Monitor the campaign

An electronic signature campaign dashboard is available on Oodrive Sign, letting you track operations in progress and take action if necessary.



1. Click **Campaigns** in the menu along the top of the screen to display the list of your signature campaigns. Here you will find the following information:

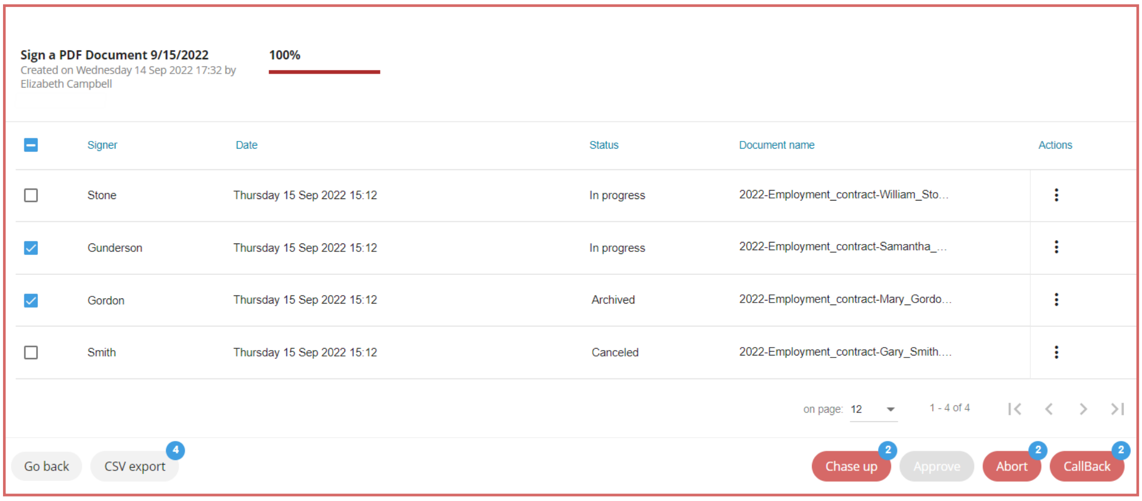
    - **Campaign name**: by default, this is the contract template name
    - **Date** the campaign was created on
    - **Status** of the campaign
        - In progress (the campaign is being sent)
        - Sent (the entire campaign has been sent for signature)
    - **Type of campaign**: remote or face to face
    - **Created by**: user who created the signature campaign
    - **Signed contract(s)**: number of signed contracts

2. If you'd like, use the filters in the panel on the left side of the screen to filter your campaigns according to your chosen criteria: name of contract, status of campaign, signatory, start and/or end date, signature mode, user who created the campaign.

3. Click a campaign to display all contracts for this campaign and monitor their progress.

    For each of them, you will see:

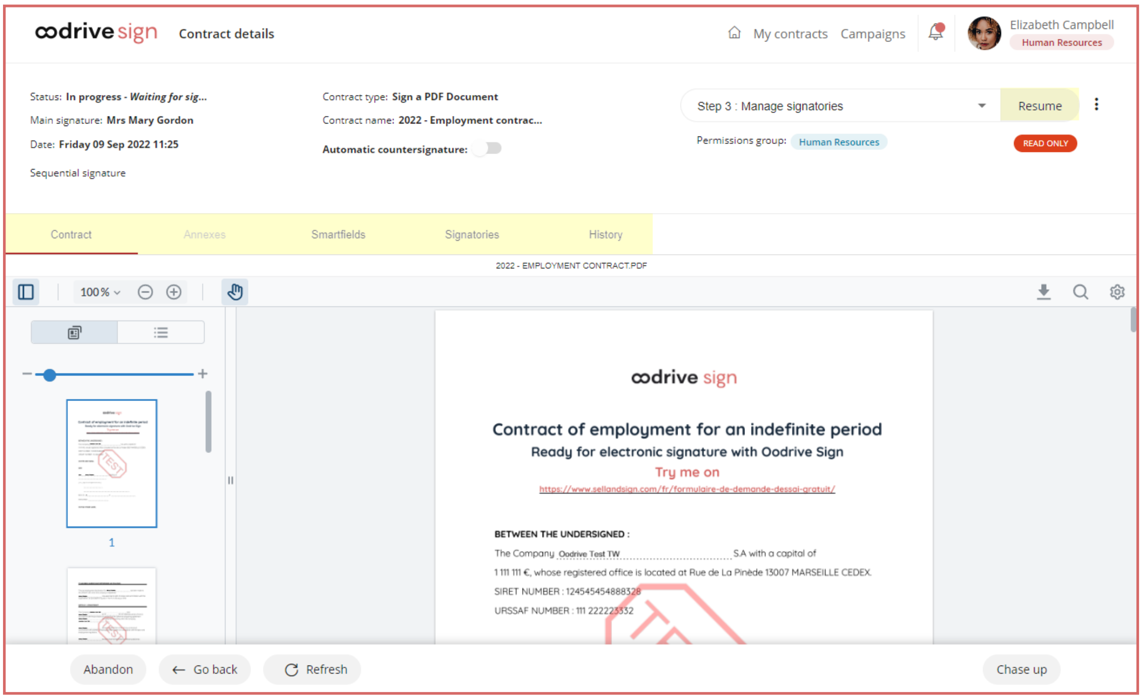
    - the signatory
    - the sending date
    - the status of the contract (in progress, to approve, approved, archived, canceled)
    - the name of the document



From the campaign overview, you can click the three dots in the **Action** column to perform quick actions on each contract.

You can also select several contracts and perform group actions using the **Chase up**, **Approve** and **Abandon** buttons.

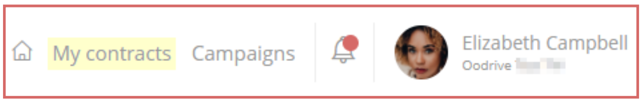
4. If you wish to view information for a specific contract, click that contract to access its detailed view.



You can also find contracts for a campaign in the **My contracts** menu, from where you can track the progress of a transaction, countersign it or even modify it. If you want to manage the campaign contracts individually, see the section Manage your contracts.

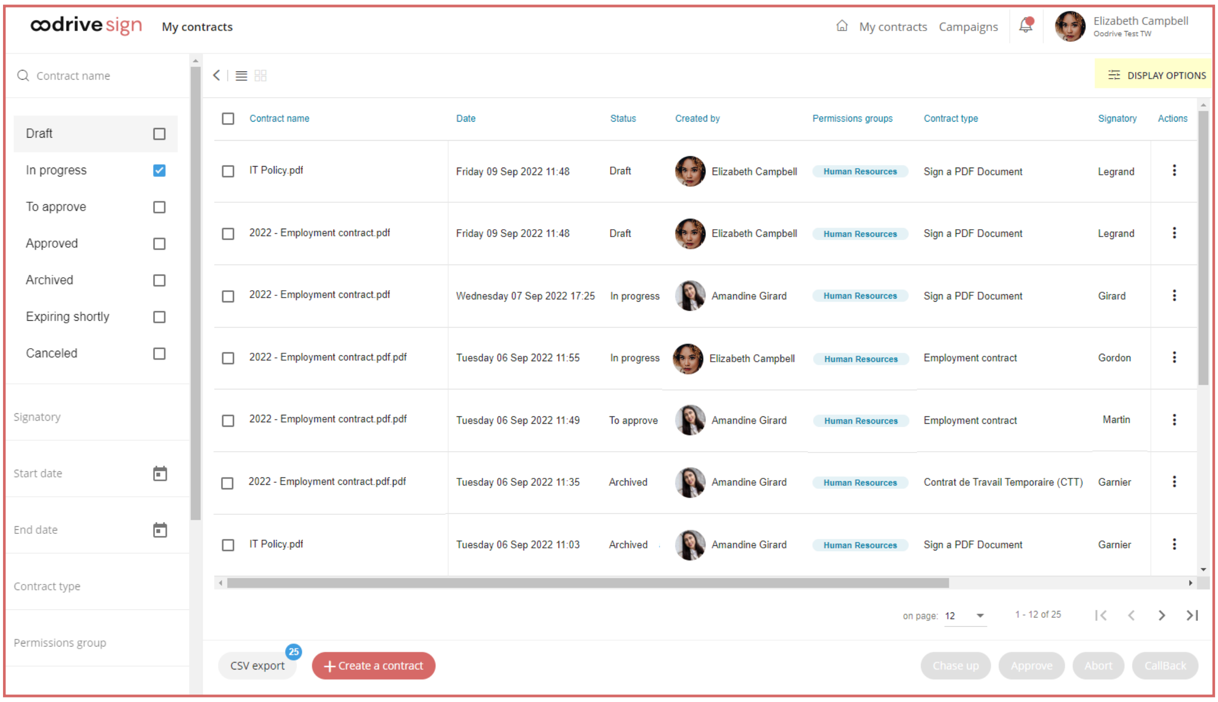
5. Managing your contracts

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:



5.1. Dashboard layout

The **My contracts** dashboard displays all transactions initiated in the permissions groups to which you have access.

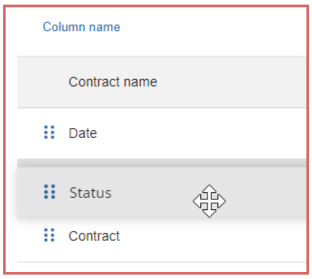


The default display is defined by your license administrator, but you can customize your dashboard display to emphasize the information that is most relevant to your work:

1. Click on **Display options** in the upper-right corner of the page.

2. Select/deselect the columns of your choice to show or hide them on your dashboard.

3. Drag and drop the column headings to arrange them into your preferred order of appearance.



4. Click **Approve** to save your customization.

If you wish to go back to the default display for the dashboard, return to the **Display options** menu at any time and click **Reset**.

5.2. Find a contract

1. To find your a contract from the **My contracts** menu, go to the panel on the left and enter the contract name in the search bar above the filters.

2. You can refine your search by filtering your contracts by:
   - Contract status (Draft, in progress, to approve, approved, archived, expiring shortly, canceled)
   - Signatory
   - Start and end date of the transaction
   - Contract type
   - Permissions group (Enterprise version)
   - User initiating the transaction

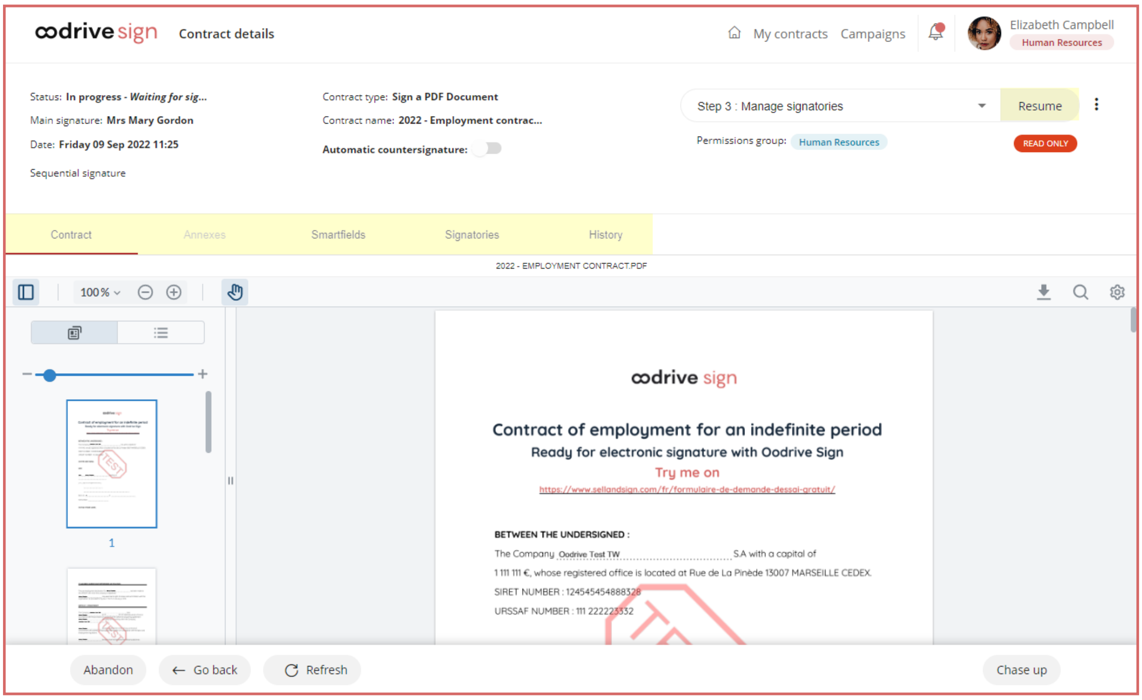
   Select one or more filters to target contracts meeting these criteria.

oodrive sign

5.3. Monitor a contract

1. In the **My contracts** menu, click a transaction to view its details.

   Information relating to the contract(s) is spread over several tabs: **Contract**, **Annexes**, **Smartfields**, **Signatories**, and **History**.



2. You can perform several different tracking actions, such as:

   - **Chase up**: send a reminder message to signatories within in a remote signature process
   - **Delete**: delete a transaction with draft status
   - **Abandon**: cancel a non-finalized transaction
   - **Approve**: countersign a contract (available only if you have the right to approve transactions)
   - **Download the contract**
   - **Download the evidence folder** (archived contracts only)

   The available actions vary according to the status of your contract, its signature mode, and the permissions granted to your account.

5.4. Edit a contract in progress

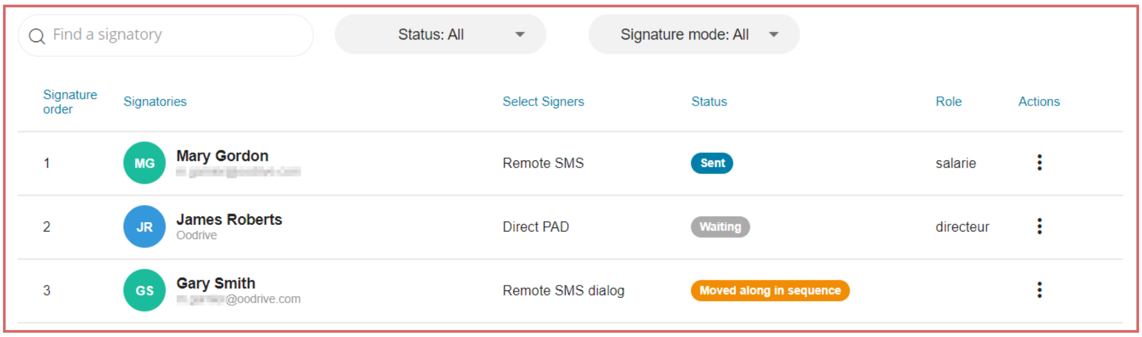
Edit signatories

At any time, you can take action on signatories and their signature processes – for example, to send reminders, update a signatory's contact details or change their signature mode – without having to cancel or recreate the transaction.

Please note: If you want to delete or add signatories, you must restart the transaction. To do this, see the section « Edit the contract », page 44.

1. In the **My contracts** menu, click a transaction to view its details.

2. Go to the **Signatories** tab. You will see the list of signatories, and their respective information.



3. To take action on a signatory, click the three dots in the **Actions** column. You can then perform the following actions:

   - **Chase up** a signatory within a remote signature process
   - **Change signature mode**
   - **Edit signatory details** (email address and telephone number required to proceed with signing)
   - **Copy signing link**
   - Select **Move along in the sequence** to postpone the intervention of a signatory in cases where the sequential signature option is enabled

     Please note: When collecting information, you cannot postpone the intervention of the first signatory, because they must fill in the contract.

Edit the contract

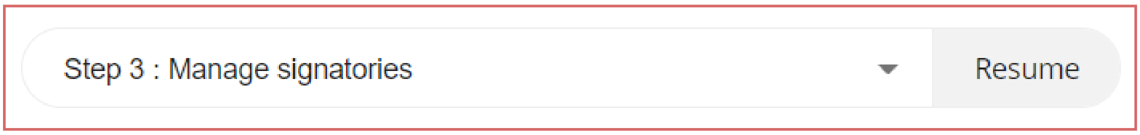
You can make changes to a contract in progress at any time before it is signed. You can make changes to:

- the PDF document(s) forming the contract or the binder
- the annexes
- the Smartfields®
- the signatories and/or their signature modes

Please note that this action requires you to cancel the transaction in progress and restart from the beginning once you have made your changes.

1. In the **My contracts** menu, click a transaction to view its details.

2. In the upper-right corner of the page, use the drop-down list to select the step from which you want to modify your contract.

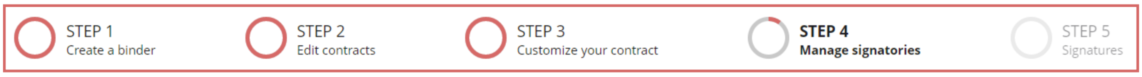


3. After selecting the step, click **Resume**.

4. Click **Interrupt transaction** to cancel the current process.

5. Make your changes.

   You can navigate from one step to another by clicking on the step of your choice in the progress bar along the top of the screen:



6. When you have finished making your changes, go back to the **Manage signatories** step, then perform at least one of the following actions:

   - **If at least one signatory is remote**, click **Send** twice to confirm that you want to send the email for signature.
   - **If the signature is face to face only**, click **Sign**.

The signature process starts again from the beginning to take account of the changes you have just made.

5.5. Countersign and download the contract

Once all the signatories have signed the contract, it must be countersigned to ensure its legally binding and conclusive status. Only managers (users with the right to approve transactions) can countersign a contract 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 panel on the left.

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 its final version of it.

Tip: If you wish, you can enable automatic countersignature when preparing the contract, at the **Manage signatories** step. To do so, enable the **Countersignature** setting in the side panel. Once the contract has been signed by the signatories, it will then be automatically countersigned, without any intervention on your part.

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 signed and countersigned version.

You can also select the **Archived** filter to find approved transactions in the **My contracts** section.

6. Managing your contract templates

As a user of the Oodrive Sign solution, you can create contract templates, which help you save time when preparing a transaction.

If you have the Manager role (ability to validate transactions), you can also make your contract templates public so that they are available to other members of your organization.

Once created, your contract templates will display as additional items on the home page of your license.

6.1. Create contract templates

Step 1: Create the contract

1. Click the icon to go to your license home page.

2. If several permissions groups are available for your license, click your profile, then click **Choose permissions group** and use the drop-down list to enter the permissions group of your choice.

3. Go to the **Sign a document** box and click **Import a document**, then use your file explorer to select the contract that will act as a template.

4. If you want to add annexes, click **See annexes**:

   - **To add an annex to the contract yourself**, click **Add an annex** and use your file explorer to add your chosen document.
   - **To collect an annex from a signatory**, click **Collect from an annex during remote signature** and enter the following information before approving the collection:
     - Name of the annex
     - Expected file type: All types, Image, Document, Video, Archive, Audio
     - Maximum file size (in MB)
     - Maximum number of files that can make up the annex
     - Whether or not the collection is mandatory

5. Click **Next**.

6. If your contract contains Smartfields, specify which Smartfields must be collected from signatories:
   - Browse the panel on the right and click the ✎ icon to edit a Smartfield.
   - Specify the required data type. To do this, you can:
     - Specify the required data type for this field (text, date, number, multiple choice, IBAN, social security number, etc.).
     - Edit the **Description** for the field (in other words, the title under which it is presented to users or, in the context of a collection, to the signatory).
   - If you want this field to be completed by the signer before signature, enable the **Collect the Smartfield based on a signature** setting.
   - If the Smartfield must imperatively be completed in order to proceed with signing, also enable the **Smartfield required** setting.
   - Once you have finished, click **Approve**.

7. If you'd like to add pre-approvers, copied-in recipients, or signatories to your template:
   - Click **Next**.
   - In the side panel, click the **+** sign to the right of the **Pre-approver**, **In copy** or **Signatory** section.
   - Select a person of your choice in the signatory directory, then click **Next**.
   - Select a signature mode, then click **Apply**.
   - Repeat these steps as many times as necessary to add other pre-approvers, copied-in recipients, or signatories

Now that you have finished preparing your contract template, you will need to save it.

Step 2: Save the template

1. Once you have finished, click **Save as Template** in the lower-left corner of the screen.

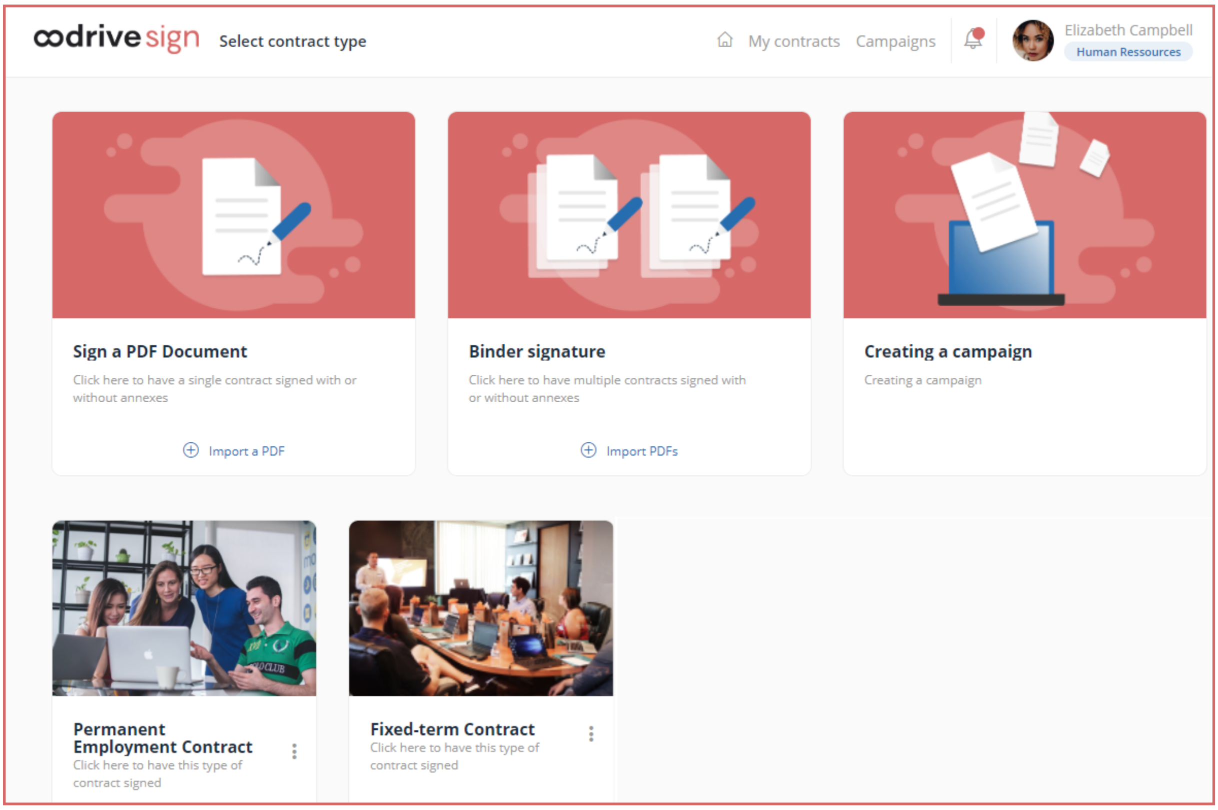
2. Enter the following information for your template:
   - Thumbnail
   - Title
   - Description
   - Position of template in the list of contract types
   - Number of signatories (min. and max.)

3. To make this template available to colleagues, disable the **Private** setting.

4. If several permissions groups are available for your license, select all groups for which the template must be available.

5. Click **Approve**.

Your template is immediately available from the home page of your signature platform.



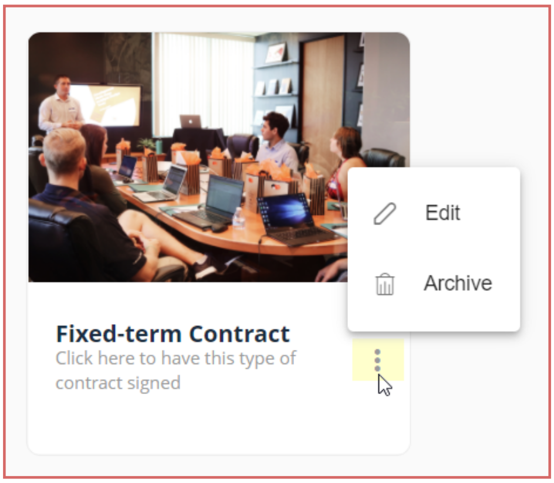
6.2. Edit or delete contract templates

Once the contract template has been created, you can edit or archive it.

1. Click the icon to go to your license home page.

2. Identify the template you wish to edit or archive, and click the three dots to the right of the template to display the available actions:

   - **To edit the template**, click **Edit** and make your changes.
   - **To delete the template**, click **Archive**. This action cannot be reversed.



7. Populating the signatory directory

Create signatory files so you can easily access your customer database when sending contracts.

7.1. Create new signatories

Create a new signatory

1. Click your profile in the upper-right corner of the screen.
2. In the side menu, click **Signatory directory**.
3. Click **Create a new signatory**.
4. You are required to complete all the mandatory fields for the signatory you wish to add to the directory:
   - **First name**
   - **Surname**
   - **Email**
5. If you have access to several permissions groups, add all groups for which the signatory must be available in the **Permissions group** field.
6. If you wish to import annexes for the signatory, go to the **Annexes** section and click **Import**, then select your chosen document from the file explorer.
7. Click **Save sheet**.

The signatory is now available in the directory, and can be selected when sending documents for signature.

Create signatories in bulk

Importing via XLSX or CSV file allows you to automate the creation of new signatory files. A pre-filled template is provided, allowing you to quickly prepare the file for import with all the personal details and options relating to each of your contacts.

1. Click your profile in the upper-right corner of the screen.
2. If you have access to several permissions groups for your license, go to the permissions group for which you want to populate the signatory directory.
3. In the side menu, click **Signatory directory**.
4. From the directory, click **Import a list**.

5. Click **Download an example file**.

6. If you wish to complete only required fields, select the **Required fields only** option.

7. Select the file format you want to use: **Excel** (XLSX) or **Text** (CSV), then click **Download** to start downloading the template in your browser.

8. Open the file and complete each line with the information required for each of your signatories, with help from the pre-filled examples provided in each column.

   A table describing the column titles is provided below to guide you in preparing the import file.

Field	Description
First name	Required field
Surname	Required field
Company name	Name of the company associated with the signatory
SIRET number	SIRET number for the company associated with the signatory
Title	Civil status of signatory. Various authorized formats: • MISTER, MR • MADAM, MRS
Email	Required field
Cellphone	The signatory's cell phone number **Note:** You must complete this field if you wish to use a signature via SMS mode (with One-Time Password or SMS thread)
Address 1	The primary address associated with the signatory
Address 2	The secondary address associated with the signatory
ZIP code	The signatory's ZIP/postal code
Town/City	The signatory's town

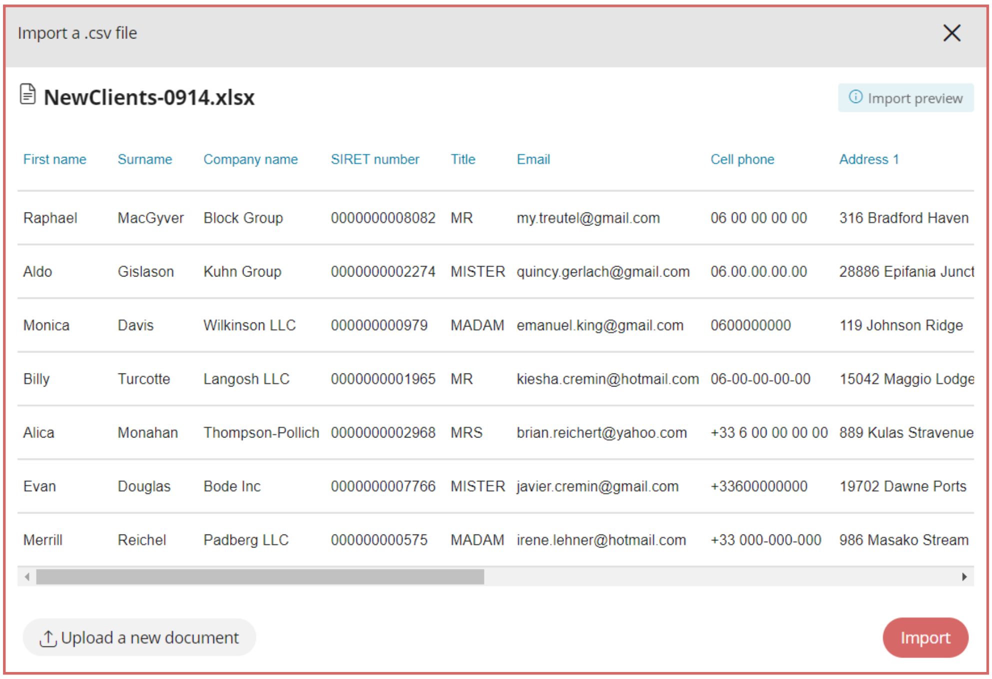
Field	Description
Country	The signatory's country
Telephone	The signatory's landline phone number
Job title	The signatory's role
Date of birth	The signatory's date of birth
Place of birth	The signatory's place of birth
Language	The preferred language for notification emails and text messages. Possible values: • fr_FR (French) • en_US (English) • de_DE (German) • es_ES (Spanish) • it_IT (Italian) • nl_NL (Dutch) • pt_PT (Portuguese)
Unique ID	Signatory's unique ID number

Please note: It is very important that you follow the format of the pre-filled items in the form, to avoid errors during import.

9. Once you have finished filling out the file, according to the formats provided and being careful to correctly complete all required fields, save the file to your computer.

10. Go back to your browser and click **Upload a .csv or .xlsx file** to select the file saved on your computer.

    An import summary is shown on the screen:

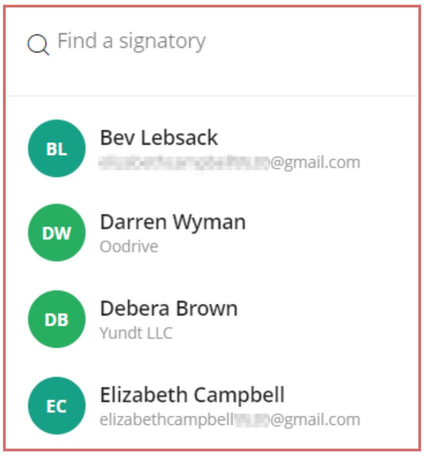


First name	Surname	Company name	SIRET number	Title	Email	Cell phone	Address 1
Raphael	MacGyver	Block Group	0000000008082	MR	my.treutel@gmail.com	06 00 00 00 00	316 Bradford Haven
Aldo	Gislason	Kuhn Group	0000000002274	MISTER	quincy.gerlach@gmail.com	06.00.00.00.00	28886 Epifania Junct
Monica	Davis	Wilkinson LLC	000000000979	MADAM	emanuel.king@gmail.com	0600000000	119 Johnson Ridge
Billy	Turcotte	Langosh LLC	0000000001965	MR	kiesha.cremin@hotmail.com	06-00-00-00-00	15042 Maggio Lodge
Alica	Monahan	Thompson-Pollich	0000000002968	MRS	brian.reichert@yahoo.com	+33 6 00 00 00 00	889 Kulas Stravenue
Evan	Douglas	Bode Inc	0000000007766	MISTER	javier.cremin@gmail.com	+33600000000	19702 Dawne Ports
Merrill	Reichel	Padberg LLC	000000000575	MADAM	irene.lehner@hotmail.com	+33 000-000-000	986 Masako Stream

If there are errors, the relevant fields will be highlighted in orange to help you identify and correct them. You can then make changes to your import file and click **Upload a new document** to reimport it.

11. After you have checked the preview for your import, click **Import**.

Below you will find an example of the signatories viewed after import.



7.2. Edit a signatory

You can edit information in the signatory's file, as well as the permission group(s) for which the signatory must be available.

1. Click your profile in the upper-right corner of the screen.
2. In the side menu, click **Signatory directory**.
3. From the directory, select the signatory you wish to modify, then click **Edit signatory information**.
4. Edit the desired fields and/or add annexes of your choice, then click **Save sheet**.

7.3. Hide a signatory

You cannot delete a signatory once they have been created. However, you can hide a signatory so that they no longer appear in the directory.

1. Click your profile in the upper-right corner of the screen.
2. In the side menu, click **Signatory directory**.
3. From the directory, select the signatory you wish to hide, then click **Edit signatory information**.
4. Click **Hide the signatory**, then **OK**.

The hidden signatory is still present on your signature platform, but they are no longer visible. If you attempt to create an identical signatory at a later date, Oodrive Sign will offer to reactivate that signatory instead.

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