RELEASE NOTES

SUMMARISED FOR PUBLIC VIEWING

PLEASE NOTE:

This is a summarised catalogue of SigniFlow release notes, authorised for public viewing.



Release Updates for SigniFlow® V2022.19.1.6 ^{09th} November 2022

New user interface for Dashboard

Old Interface

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+ Create New	New SigniFlow W	orkflow						
% Portfolios	Create New Work	kliow						
2 Bulk Signing								
Profile >								
Business Profile		30		102		1/10		1
Dashboard ¥					(X)	LHZ CANCELLED		L EXPIRED
Overview								
🖸 Pending		15		E11		00		50
Circulating						98		
Cancelled		REJECTED		COMPLETED		DIAFTS		SHARED WITH ME
Expired	9-9	0		4.40		F7		4
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E Deleted		TOTAL	ت	AVAILABLE				
Portfolios								
Reporting								
Report Manager								
Q Search								
Templates								
Form Manager								
Form Builder								
Forms								
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New Interface

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+ Create New	Create New Workflow Upload a document and send it for approval and/or signature			
🐔 Dashboard 🗸 🗸	+ Create New			
Portfolios				
🖪 Forms 🗸 🗸			2	\bigcirc 0
Bulk Signing Profile	PENDING	CIRCULATING	CANCELLED	EXPIRED
l≝ Reporting ✓		6 9	C 2	
Templates	REJECTED	COMPLETED		SHARED WITH ME
Q Search		A		
- My business				
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- ✓ New ribbon-menu design.
- Menu items have been rearranged so that items with higher general usage are ranked higher up on the menu.
- ✓ Depending on the user's role, the menu items may display differently than on the illustration.
- \checkmark Items that a user does not have access to, will not display on the menu.
- Throughout the Create Workflow screens, all buttons that indicate a 'Next' action, are now coloured light blue as per the '+Create New' button indicated below:





New Create workflow user interface

Old Design

				A G
+ Create New	Upload	Information	Recipients	
% Portfolios		2	3	
2 Bulk Signing	Upload document.	Configure document settings.	Add signers, approvers and/or viewers.	
Profile >	Upload your new document			
🔛 Business Profile				
Dashboard ¥		Use a document template:		
Reporting		Select a template:		
📓 Report Manager				-
Q Search			Use Document Template	
Templates				
Form Manager	Data and Data DDE TYT VMU VDE Ward Fund Down Date: Code and page files have			
Form Builder	Click to import your document.			
Forms				
😃 Log Out				
SigniFlow® About Priv	aey Policy Terms of Use Support		Powered by SigniFlow [®] │ Copyright © 2022 SigniFlow	All rights reserved. v2022.19.0.4

New Design

		4= 🕦
+ Create New	3 Upload –	Information Recipients Preparation
📽 Dashboard 🗸 🗸	Upload your new document	
Portfolios		Your Documents
🔁 Forms 🛛 🗸		You can add multiple documents here that will be merged into a single workflow
C Bulk Signing	Drag and drop your documents to start a workflow	
🚔 Profile 🗸 🗸	Click to upload your document.	
l≅ Reporting ↓		
Implates	Use a DocFusion template.	
A Search	Please select • Use template	
	Or	Uploaded documents will be displayed here
	Use a document template:	
	Please select Use template	
	Or	
	Signiflow Form:	
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- ✓ New progress indicator:
 - A fourth step indicator 'Preparation' was added to enhance progress view of where a user is during the creation of a new workflow.
- ✓ Drag-and-drop area was enhanced:
 - Better mobile responsiveness.
 - 'Click to upload your document(s)' button can now be used to add multiple documents from your local document folders on your hard drive, or from linked folders on your network drive(s) to add the documents one by one to the workflow.
- ✓ Use DocFusion template:
 - This is only visible to users with an active DocFusion for SigniFlow connector and license.
 - The dropdown menu will display all DocFusion templates linked to the user's SigniFlow account.
 - A user can add one DocFusion template to a SigniFlow workflow.
 - Once the template is selected, a form will appear, requesting that the user complete the dynamic fields drawn from the DocFusion template.
 - By completing and submitting the form, the data captured in the form will automatically be merged with the document as per the DocFusion configurations for that document.

✓ Use a document template:

- Visible to all users.
- The dropdown menu will display only the documents that are available to the user from the SigniFlow template library.
- Access to documents saved in the SigniFlow template library is configured by the system administrator.
- A user can add one, or multiple template documents to a single workflow
- Once a template is selected from the dropdown, choose 'Use template'. To add a second document, select another document from the template library and choose 'Use Template'
- Repeat until done.
- ✓ Use a SigniFlow Form:
 - Visible to all users.
 - The dropdown menu will display only the forms that are available to the user from the forms library.
 - Access to forms saved in the SigniFlow forms library is configured by the system administrator, or by the forms administrator.
 - Once a form is selected, the user will be redirected to the 'View Form' interface, where the form can be completed and submitted to workflow.

✓ Ability to upload multiple documents in a single workflow:

- A new 'Your Documents' section has been added to the screen. This section is visible either to the right of the upload section (large screen size), or underneath the upload section (smaller screen sizes and mobile screens).
- Multiple documents or document templates can be added to a workflow. These documents must be added one-by-one and will be chronologically displayed in the 'Your Documents' section, as indicated below.
- A user can change the sequence of the documents before they are merged into a single document by choosing the light blue up and down arrows.
- The system will automatically assume the name of the document on top, as the collective name of the document(s) uploaded. This can be edited on the screen that follows.
- A document can be deleted from the workflow by choosing the red dustbin button next to the document name.

• Once the document(s) is uploaded, choose the 'Next' button to proceed to the next screen.

	۸ ۰	
+ Create New	1) Upload — (2) Information — (2) Recipients — (2) Preparation	
🕈 Dashboard 🗸 🗸	Upload your new document	
Portfolios	Your Documents	
Forms 🗸	You can add multiple documents here that will be merged into a single workflow	
Profile V	Drag and drop your documents to start a workflow Click to upload your document. Document Name	
Reporting V	Attendance Register - Demound f	<u> </u>
Q Search	Use a DocFusion template.	
	Use a document template: Cocument template: Please select Use a Signification form: Signification: Please select Use form Please select Use form	¥
		Next
South Africa About Privac	hacy Policy Terms of Use Support Powered by SigniFlow # Copyright © 2022. SigniFlow. All rights reserved.	v2022.19.1.6

✓ New Document Information User Interface

Old Design

						40
+ Create New		Upload	Information	ation	Recipients	
% Portfolios			2		3	
2 Bulk Signing		Upload document.	Configure docur	ment settings.	Add signers, approvers and/or viewer	
Profile >	Document Information					Cancel Flow
Business Profile	D					
Dashboard ¥	Document ID: 943342 Document Name: Attendance	Register - Demo				SIGNIFLOW*
Reporting	Decement runne. Add Te News					
Report Manager	Kename document Add to Name	Replace document Spirt pages S	tart new Portiolio Add To Existing Portiolio			
Q, Search	Priority:	Due Date:	Auto Expire:	Auto Remind:		
I Templates	Normal	•	No	♥ No	*	
K Form Manager	Meta Data Type: 🟮	Email 🕄	When Complete			15:654
E Form Builder	MetaData Types	Send All	✓ Store in SigniFlow	*		
Forms	Custom Message:					
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New Design

	AT ()
+ Create New	Upload Upload Preparation Preparation
🎓 Dashboard 🗸 🗸	Document Information (Document ID: 2490)
Portfolios	
🖺 Forms 🗸 🗸	Ald Document Name Attradance Register - Demo Craste new portfolio Link to confolio
C Bulk Signing	
💄 Profile 🛛 🗸	Define how you would like this workflow to be set up and create a message that the recipients will see when receiving your document.
🗠 Reporting 🗸 🗸	
Templates	Never Send All Store in Significa
Q Search	
My Business	High Priority: Auto Remind:
	Custom Message: X
	B / U 新客省目ににX,X' A 後週週本 ● Font Sea_ + Font Family + Font
	Restace document Solit pages
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South Africa About Priva	v Policy Terms of Use Support Powered by StaniFlow # Convision 0.2022 SaniFlow All rights reserved, v2022 19.16
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✓ Edit Document Name:

- Users can now edit the name of the document by simply clicking in the text box and renaming or editing the name.
- The system will automatically save the name in the text field when proceeding to the next step.
- If parts or all the document name is not editable, it means the systems administrator is prohibiting certain changes.

Portfolio Name

✓ Create new portfolio:

- By choosing 'Create new portfolio', a modal will pop up where the user needs to enter a name for the new portfolio, then choose 'Create Portfolio' to save the new portfolio name, or choose 'Close' to close the modal and stop creating a new portfolio.
- The document(s) uploaded will form the first document in the newly created portfolio and will be available after the workflow has been released in the Portfolio section.
- ✓ Link to portfolio:
 - By choosing 'Link to portfolio', a modal will pop up where the user can choose an existing portfolio to link the uploaded document to.
 - To link the document to a portfolio, choose 'Link'.
 - A 'Success' message will appear, choose 'Close' to dismiss.
- ✓ Due Date:
 - Choose a date from the date picker which will appear when a user clicks in the Due Date text box.
 - The selected date will be sent to the recipient(s) as a calendar invite in the notification email.
 - If a date picker is not available, then the 'Enable Expire Period Lists' is enabled by the system administrator.
- Email (dropdown) New style, no functional change from previous version:
 - o 'Send All' (default) will send an email notification to all recipients in the workflow.
 - 'Skip All' will skip sending out an email notification to all recipients in the workflow.
 - 'Skip First' will only skip the first recipient in the workflow and send out notifications to all other recipients in the workflow.
- ✓ When Complete New style, no functional change from previous version.
- ✓ High Priority:
 - This new function replaces the previous 'Priority' dropdown that had three options, Low, Normal and High.
 - Low priority is no longer an option.
 - The new toggle switch, switches between Normal Priority (default / off) and High Priority (on).
- Auto Remind:
 - This new function replaces the previous 'Auto Remind' dropdown that had two options, No (default) and Yes.
 - The new toggle switch, switches between the Auto Reminder being off (default) or on.
 - If on, the recipient(s) will receive an email notification every 24 hours to remind them to take action.
- ✓ Custom message:
 - The symbol to the right of the message box, has been added to maximise the message box size to accommodate ease of writing longer messages.
 - All previous version message settings were preserved.

✓ New thumbnail viewer:

- The thumbnail viewer was enlarged so users can easily identify the first page of the document without having to click on the small thumbnail.
- Users still have the ability to open a large modal to view the first page of the document, by clicking anywhere in the thumbnail.
- ✓ Replace document (dark blue button, directly underneath the thumbnail):
 - If the button is visible: It means the user is able to click and replace the document by uploading a replacement document.
 - If the button is not visible: It means the user is not able to replace the document with another document. This can be because:

- The document is linked to a Portfolio In this case, use the 'Unlink from Portfolio' function, then replace the document.
- There were multiple documents uploaded In this case, to replace the documents, the workflow needs to be cancelled and restarted.
- Please note:
 - If the user used Templates, then a replacement template cannot be uploaded from here. For the user to replace a template, they need to cancel the workflow by choosing 'Cancel' and restart the workflow creation.
- Split Pages (Button directly underneath the thumbnail viewer):
 - New style, no functional changes from the previous version.
- ✓ Cancel button:
 - \circ $\;$ If the button is visible: The user can click to cancel the workflow.
 - If the button is not visible: The document is linked to a Portfolio, the user first needs to use the 'Unlink from Portfolio' function and once unlinked, choose 'Cancel'.

The large 'Proceed' button has been replaced by a light blue 'Next' button. This button will save the current configuration and proceed to the next screen.

New setup workflow screen

Old Design

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+ Create New		Upload	Info	ormation	Recipients	
% Portfolios		(1)		2	3	
2 Bulk Signing		Upload document.	Configure d	locument settings.	Add signers, approvers and/or vie	wers.
Profile >						
Business Profile	Set up a new workflow for your d	locument: 🗊				
Dashboard ¥		Iemplate Name	•			
Reporting	& +	2 +	<u> </u>	<u></u>	4 •	<u>م</u>
Report Manager	Add Yourself	Add Signer	Add Group	Add Face-to-Face	Add Approver	Add Viewer
Q Search						
Templates						
🖪 Form Manager						Back
E Form Builder						
Forms						
😃 Log Out						
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New Design

	1					A= 💽
+ Create New			1 Upload — 2 Information	3 Recipients — 4 Preparation		
🛠 Dashboard 🗸 🗸	Set up a new workflow for your document: 0					
Portfolios	<u>.</u>	**	<u></u>			
🗈 Forms 🗸 🗸	Add Individual(s)	Add Group	Add Face-to-Face	Apply Template		
C Bulk Signing	Recipient Details			Advanced Settings		
🗠 Reporting 🗸 🗸	Elect Monadel	Last Name				
Templates	Trachampy TAGENY	Sell Last realing				
Q Search	Email	► +27 • X00	0000000			
My Business	Action Required Sign Document	€ Signature Type Req ✓ Digital	uired 0			
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South Africa About Prive	acy Policy Terms of Use Support				Powered by SigniFlow® Copyrig	ht © 2022 SigniFlow. All rights reserved. v2022.19.1.6
🛹 Ad	vanced Setting can be	set if req	uired			
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	Advanced Settings	0				
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	Proxy Allowed ——			- Language settings		
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	Yes		~	No	e •	

New set	tup workflow for yo	ur document:					
	Set up a new workflow for your document: 🕄						
	Add Individual(s)	Add Group	Add Face-to-Face	Apply Template			
	Recipient Details Advanced Settings D						

The function blocks have been redesigned and reduced in accordance with features most used. Enhancements include:

- 'Add Yourself' block removed.
 - To add yourself, click on 'Add Myself' in the 'First Name' text field.
- 'Add Signer' block removed.
 - To add a signer, the user can simply start typing the recipient's name in the 'First name' field. If the recipient exists in the user's contacts, their name will appear.
 Simply click on their name to insert all their details. If the recipient does not exist, enter their First name, Last name, and email address (minimum requirements).
- 'Add Approver' block removed.
 - To add a recipient as an approver, choose 'Approve Document' from the Actions Required dropdown.

Rec	ipient Details	
	First Name(s)	+ Add Myself

• All the user's details will automatically load.

	First Name(s)	+ Add Myself
	Email	
(- Action Required	
	Sign Document	~
1	Sign Document	
	Approve Document	
	View Document	
	Confirm and Add	

- Add Viewer block removed:
 - To add a recipient as a viewer, choose 'View Document' from the Actions Required dropdown.

	- Action Required	0
	Sign Document	~
	Sign Document	
	Approve Document	
П	View Document	
	Confirm and Add	

- Apply Template block added:
 - Choose to apply a predefined, saved workflow template.
 - The newly enhanced dropdown will sort the saved templates under 'Personal' and 'Business'.

•	To apply the template, simply click on it. The system will automatically load the
	template. Click 'Load' to confirm if correct, or 'Cancel' to cancel loading a template.

\sim	Advanced	Settings
	Auvanceu	Settings

Set up a new workflow for your do	ocument: 🕄		
Add Individual(s)	Add Group	Add Face-to-Face	Apply Template
Recipient Details			Advanced Settings
	1		

To improve user experience, some functions are now hidden behind the 'Advanced Settings' toggle switch:

- These functions are (may vary, depending on Business Administration settings):
 - Proxy Allowed
 - Send Completed Email
 - Language Settings
 - Force Personal Digital certificate
 - FaceSign
- To display these functions, toggle the switch on.
- To hide these functions, toggle the switch off.
- The last used setting will automatically be saved.
- Signature Type Required
 - Choose between Digital or Electronic Signatures.
- ✓ Confirm and Add button:
 - Once a recipient is loaded and their settings are configured, the user needs to choose 'Confirm and Add' to add the recipient to the workflow.
 - Note: Actions Required (Sign Document, Approve Document and View Document), Proxy Allowed and Signature Type (Digital or Electronic) can be set after 'Confirm and Add' button in the Sign Order section that appears after a recipient is added.

'Reset' and 'Collapse' buttons were removed – redundant.

Sign Order	•	Recipient Name	Action Required	Proxy Allowed	Signature Type		
• 1 of 1		PBSA Demo	Sign Document 🗸	No	Digital	~	â
Save as Template							
Back					- 1	Cancel	Next

'Save Template' button: will only appear after at least one recipient has been loaded in the workflow.

- ✓ 'Back' and 'Cancel' buttons are now grey and repositioned for a better user experience.
- 'Go to DocPrepper' button has been replaced by the light blue 'Next' button and moved to the bottom right-hand side of the screen for a better user experience.

NEW FEATURES / ENHANCEMENTS (SYSTEM FRONT-END)

- \checkmark Better mobile and small screen responsiveness.
- All the screens discussed in this document were redesigned for a better user experience on both large and smaller or mobile screens.

E ~ 4 33 🚯	E ~ 4 33 🚯
1 2 3 4 Upload Information Recipients Preparation	1 2 3 4 Upload Information Recipients Preparation
Upload your new document	Upload your new document
Click to upload your document.	Click to upload your document.
Or Use a DocFusion template.	Or
Or _Or	Or Use a document template:
Please select Vse	Or
Use a SigniFlow form:	Use a SigniFlow form: SigniFlow Form: Please select
Vour Documents You can add multiple documents here that will be merged into a single workflow	Your Documents You can add multiple documents here that will be merged into a single workflow
	Document Name 3 Demo Signers - 2 Page - TEST PDF.pdf
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1 2 3 4 Upload Information Recipients Preparation	Replace document Split pages
Document Information (Document ID: 2500)	Due Date: Never
Edit Document Name: 3 Demo Signers - 2 Page - TEST PDF Portfolio Name Create new portfolio Link to portfolio	Email Send All Vhen Complete Store in SigniFlow
Define how you would like this workflow to be set up and create a message that the recipients will see when receiving your document.	High Priority:
	Custom Message:
CLICK Signature TEST-orfaced Resson	B $I \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $
Sample Terms Provate financial — If you have any processes in your business that diff equines your subtranes to port-own - sign - enall documents and contacts, your business to strong resells contained, expension to business, philosity new offer the result advanced evelopment on-business particulations, any later to the market tracks, or contactive interface or should result forms along method and days any later to the market tracks, or contactive interface or should result forms along method and days and hours must mission. Fully uniquited advances	
Sample Terms Process fascade If yes have any processes in your business that still requires your exclanars to part - scali-stilla - event documents and cosmoch, your business is strophy raining unclassed, expenses is docubed by a failway free of this if the stall document document on charating partitions a while or its market that (OV) in costable 21 th tight or showing fails forms drange available or the market that (OV) in costable 21 th tight or showing fails are done available	
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Sample Terms Present feasients	
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Copyright © 2022 SigniFlow. All rights reserved.	

First Name(s)	
	+ Add Myself
Last Name	
Email	
Mobile	
Action Required	
Sign Document	
	8
Signature Type Required	
Signature Type Required Digital	v
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Signature Type Required	<u> </u>
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Signature Type Required Digital dvanced Settings Proxy Allowed No Language settings Opefault Send Completed Email Yes	
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Signature Type Required Digital dvanced Settings Proxy Allowed No Language settings O Default Send Completed Email Yes Force Personal Digital Certificate No	
Signature Type Required Digital dvanced Settings Proxy Allowed No Language settings Opefault Send Completed Email Yes Force Personal Digital Certificate No	

- New Portfolio Template feature (BETA version Must start with a form).
 - Note It is possible to start a template from a document (not a form), however this will require training. Please contact your account manager or log a ticket with support <u>here</u>.

SigniFlow[®] has added a new feature to Portfolios, in addition to the standard functionality. Users can now create and re-use portfolio templates.

Before setting up a portfolio template, you need to have created the following:

- A created form
- A workflow template
- A DocPrepper template

To create a portfolio template:

Go to the Portfolios basket from your dashboard, or access Portfolios from the left-hand menu.

				A 😐 💽
+ Create New	Create New Workflow Upload a document and send it for approval and/or sign	nature		
🕷 Dashboard 🗸 🗸	+ Create New			
Portfolios				
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C Bulk Signing	PENDING	CIRCULATING		EXPIRED
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Q Search	V REJECTED	COMPLETED	DRAPTS	SHARED WITH ME
A My Business	5		ഗ പ 34	9 66
	PORTFOLIOS	DELETED	TOTAL	AVAILABLE
: Administrator				

Click on 'Portfolio Templates'.

Create New		Create Portfolio	Portrolio Templa	ites							
Dashboard	~	Show 10 ∨ entries							Search		
Portfolios		Portfolio ID 🚽	Name 👙	Total Documents 🍦	In Progress Documents	Status 👙	Priority 🖨				
Forms Bulk Signing	~	• 113	Used/Demo Vehicles 950321 0009 084	4	2	In Progress	Normal	Open Delete	୭	*	
Profile Reporting	ž	112	New Multi	3	1	Pending Upload	Normal	Open Delete	S	<u>*</u>	
Templates		 111 	Portfolio2 Wed Oct 12 2022	3	1	Pending Upload	Normal	Open Delete	୭	<u>*</u>	
Search My Business		110	Portfolio Wed Oct 12 2022	3	1	Pending Upload	Normal	Open Delete	5	*	
OCFLOW		• 24	One	2	0	Completed	Normal	Open Delete	୭	*	
Administrator		Copy Excel F	Delete Checke	d Portfolios							
		Showing 1-5 of 5 entrie	es							Previous	1 Next
			5								

In Portfolio Templates, you can create a new template, edit and delete your existing templates.

Click on 'Create new template'.

+ Create New	Back Show 10	Create new template				Search:
Dashboard	۲ ID	▲ Name	CreatedDate	Complete	¢	¢
Portfolios	42	Used/Demo Vehicles	19 Oct 2022	Yes	Edit	Delete
🖉 Bulk Signing	Showing 1	-1 of 1 entries				Previous 1 N
Profile	~					
Reporting	•					
Templates						

On the screen that follows, give your template a name.

emplate Name			
Template Name			

Select a Form.

Document Type:	Form:		
Form ~	Please select		
Workflow Template:	Q Search		
Please select -	Please select		
Document Name:	O Multi		
	O Portfolio	Documents and placeholders will be displayed here	
	 Portfolio Temp 		
	O Used/Demo Vehicle		

Select a Workflow Template.

Define how the portfolio sh	hould be structured and what it should		
contain. You will be able to portfolio made from this te	add placeholders/documents to a mplate.		
Document Type:	Form:		
Form	✓ Portfolio ✓		
Workflow lemplate:	Prepper lemplate:		
Please select	Please select		
Q Search			
Personal	Additional options	Documents and placeholders will be displayed here	
 Portfolio Temp - Step 	ps: 2 - Steps: 2		
 Portfolio Temp - Step 	ps: 3		
 Portfolio Multi - Step 	ps: 3		
O Multi - Steps: 3			
O Used/Demo Vehicle	- Steps: 3		
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Select a DocPrepper Template.

Define how the portfolio shoul contain. You will be able to add	ld be structured and what it should I placeholders/documents to a		
portfolio made from this temp	late.	M	
Document Type:	Form:	III III	
Form	✓ Portfolio ▼		
Workflow Template:	Prepper Template:		
Portfolio - Steps: 3	Please select •		
Document Name:	Q Search		
	Personal •	Documents and placeholders will be displayed here	
	○ Portfolio Temp - 2 Signers.		
	 Multi - 2 Signers. 		
	 Used/Demo Vehicle - 2 Signers. 		
	 Portfolio - 2 Signers. 		

Give your Document a Name and click on 'Add Document'.

Document Type:	Form:	III III
Form	✓ Portfolio ▼	
Workflow Template:	Prepper Template:	
Portfolio - Steps: 3	▼ Portfolio - 2 Signers. ▼	
Document Name:		
Document Name	Additional options	Documents and placeholders will be displayed here

Add Some Placeholders to your portfolio and name them.

Every time you would like to add a placeholder to your portfolio, name your placeholder and click on 'Add Document'.



Documents	Shares				
Use the below drop dow portfolio. This can be ac template.	vns to define wh Ided to and edite	o you wou ed on portf	ld like to olios m	o have access to the ade from this	
Send Email Share Notific	ations 🕜				
Business					
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Department:					
	✓ Viev	ver	~	Share	
Team:					
	✓ Viev	ver	~	Share	
User					
	Viev	ver	~	Share	
Workflow Users from Te	emplate				
Signer 1	• Viev	ver	~	Share	

Select the users you would like to share your portfolio with and assign their access level. Then click on 'Share' alongside each unit or user.

Use the below drop downs to define who you would	like to have access to the portfolio.	Name	Туре	Access	
This can be added to and edited on portfolios made f	rom this template.	Simor 1	Individual	Viewor	m
Send Email Share Notifications 😰		Signer 1	norridan	VIEWEI	
Share When An Action Is Required 👔		Signer 2	Individual	Contributor	Ť.
Business					
Danny UAT Viewer 🗸	Share				
Department:					
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Team:					
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User					
Viewer 🗸	Share				
Workflow Users from Template					
Signer 2 To Contributor	Share				

Once the shares have been set up, click on 'Save'.

+ Create New	Portfolio Template				
Dashboard V Portfolios Forms	Portfolio Documents Shires				
인 Bulk Signing	Use the below drop downs to define who you would like to have access to the portfoli This can be added to and edited on portfolios made from this template.	0. Name	Туре	Access	
🗠 Reporting 🗸 🗸	Send Email Share Notifications 🔘		al	Viewer	<u> </u>
Templates Search My Business Cocclow Administrator	Share When An Action B Required Business Disony UAT Viewer Department: Viewer Viewer User Viewer Viewer	Success Portfolio template saved.			Ĩ
	Workflow Users from Template Signer 2 Contributor Share				

How to use Portfolio Templates

Now that your portfolio template has been created, use it by following the instructions below:

Go to the Portfolios basket on your dashboard, or access Portfolios from the left-hand menu.

🏶 Dashboard 🛛 🗸	+ Create New			
 Portfolios Forms Bulk Signing 	2 Pending	P 9 Circulating	Cancelled	O EXPIRED
Profile Reporting Templates		Completed	C 7 Drafts	O SHARED WITH ME
Q Search My Business CDOCFLOW	5 PORTFOLIOS		34 TOTAL	966 AVAILABLE

+ Create New	Create Portfolio F	Portfolio Templates									
Dashboard 🗸	Show 10 v entries									Search:	
Portfolios	Portfolio ID	Name	Total Documents	In Progress	s Documents 💠 Status	Priority					
Forms 👻	116	Portfolio Thu Nov 10 2022	0	0	Pending Release	Low	Open	Delete	5	*	
Profile V	113	Used/Demo Vehicles 950321 0009 084	4	2	In Progress	Normal	Open	Delete	5	*	
Reporting 🗸	112	New Multi	3	1	Pending Upload	Normal	Open	Delete	5	*	
Templates Search	• ₁₁₁	Portfolio2 Wed Oct 12 2022	3	1	Pending Upload	Normal	Open	Delete	5	±	
My Business	• 110	Portfolio Wed Oct 12 2022	3	1	Pending Upload	Normal	Open	Delete	5	*	
Administrator	O 24	One	2	0	Completed	Normal	Open	Delete	5	*	
	Copy Excel PDF Showing 1-6 of 6 entries	Delete Checked Portfolios								Previ	ous 1 Next

Select the Portfolio Template you would like to use, and then click on 'Create Portfolio'.

	Create New Portfolio
	New Portfolio Create a brand new portfolio and easily upload, share and manage workflows in one centralised location. Portfolio Name:
	Create Portfolio
	Portfolio Template Use a prebuilt portfolio template to easily set up complex or repetitive portfolios. You can
	create portfolio templates and share them with your team, department and business from here.
	Portfolio Template: Used/Demo Vehicles Used/Demo Vehicles Portfolio
Name your portfolio ar	d click on 'Next'.
	Create New Portfolio
	Portfolio Name Portfolio Name
	Back Next
Confirm or enter your r	equired workflow users and click 'Next'

Required Workflow Users This template requires use	rs to be selected before creation	is finalized. Select your us
First name (Signer 1):	Last name (Signer 1):	Email (Signer 1):
User	One	uo@noreply.com
First name (Signer 2):	Last name (Signer 2):	Email (Signer 2):
User	Two	ut@noreply.com

Fill in the form and click 'Submit'.

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SIGNIFLOW®
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File Upload
Choose File Demo Workflow - 1 Signer - Danny.pdf
Submit

Once the form has been submitted, your portfolio will be created.

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