



SigniFlow V2025.1.0.0 Release notes. 01st January 2025

This document is confidential

 SIGNIFLOW®



01st January 2025

Introducing the next evolution in Workflow Management.

We are proud to unveil the latest version of our workflow engine, designed to revolutionise how businesses manage e-signature workflows. With a focus on enhanced efficiency and productivity, our advanced system offers a fully optimised workspace and dashboard, delivering a superior experience for handling documents and tasks.

This new release introduces an enhanced task management system that groups all outstanding tasks into one intuitive interface, ensuring faster execution and better organisation. We've significantly reduced the number of clicks needed to create workflows, making the entire process seamless and easy to use.

Our enhanced document preparation tool allows users to quickly prepare documents for approvals and signatures, turning ordinary contracts into powerful, customisable forms with just a few clicks. Additionally, the improved bulk signer tool enables executives on the move to manage high-volume signing processes with ease, saving you valuable time.

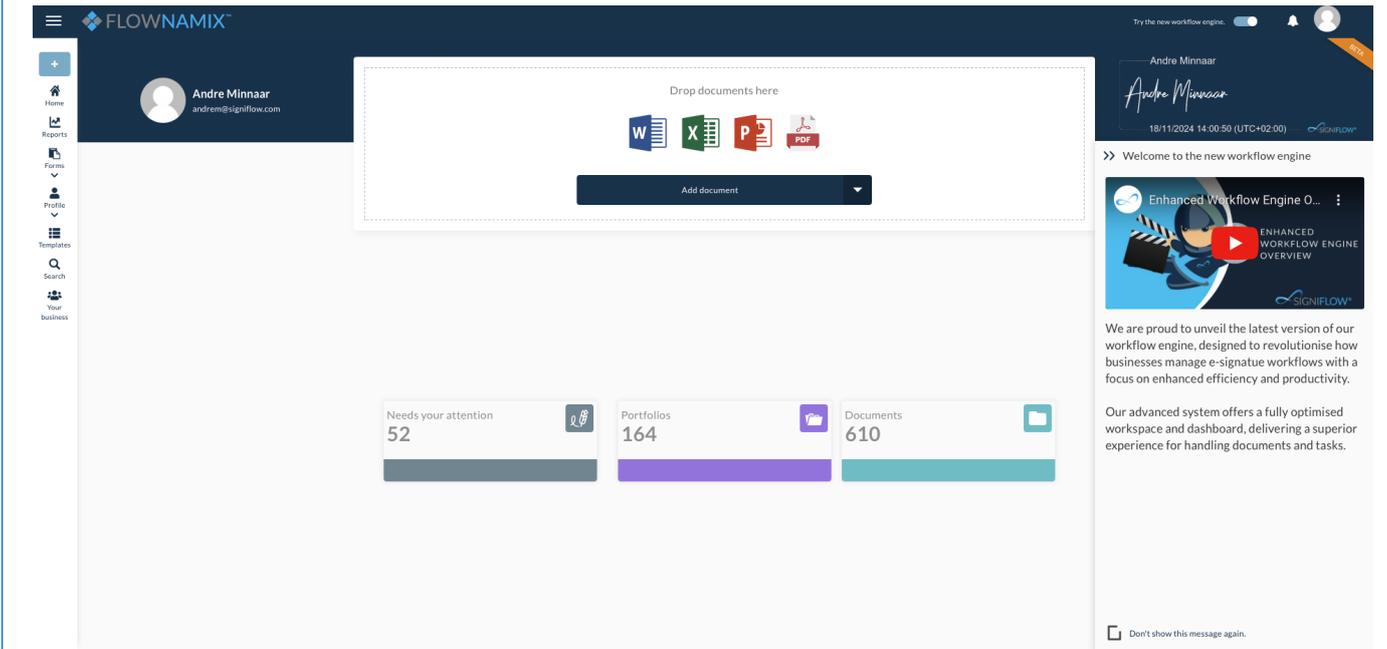
Security and transparency are at the forefront with the new easy-to-navigate, upgraded audit trail and event logging system, now with enhanced geo-location tracking of signers, to monitor every stage of the signing process.

During the BETA phase, you can effortlessly switch between the current and new systems, experiencing firsthand how these enhancements transform your e-signature workflow management. This isn't just an upgrade - it's a transformative solution for businesses aiming to streamline document processes and boost productivity.

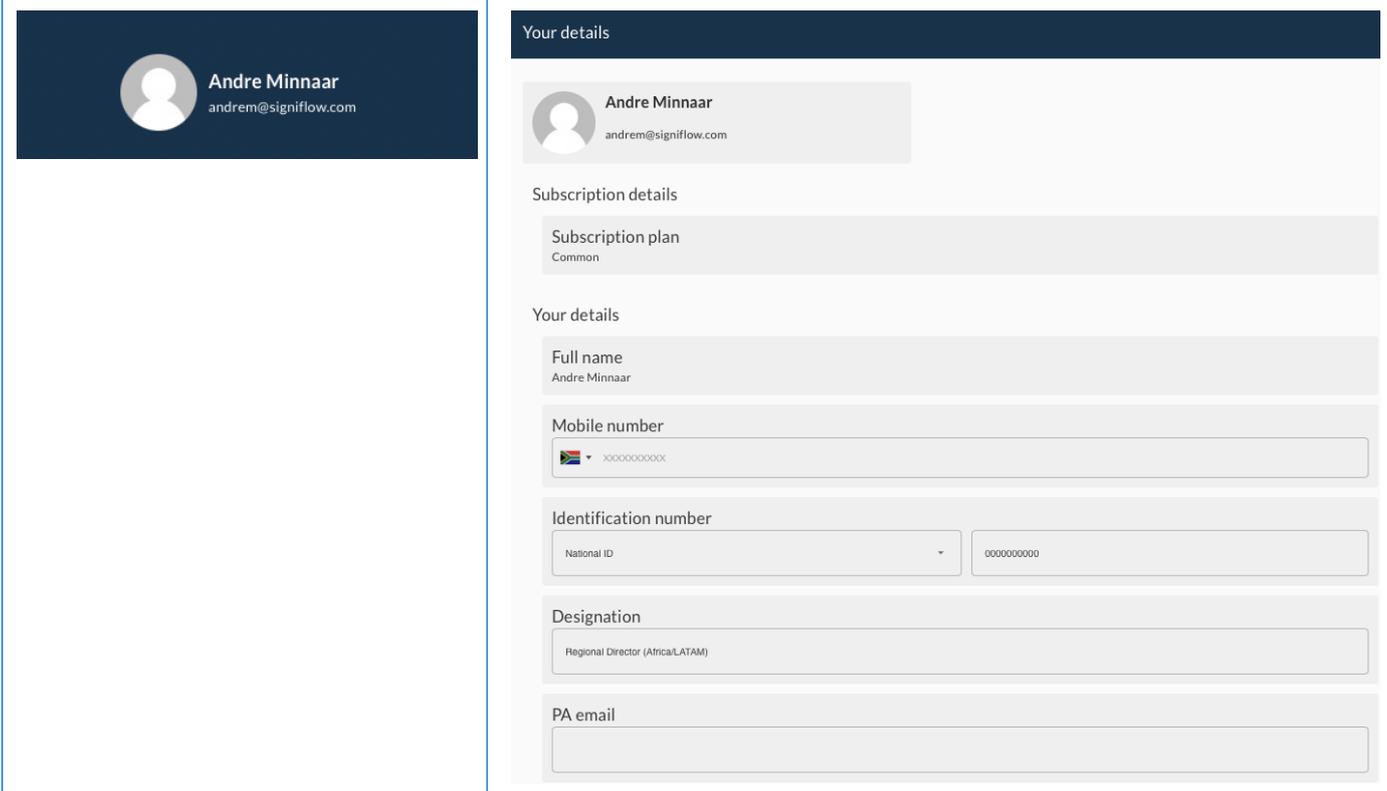
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Leon van der Merwe
Chief Executive Officer
SigniFlow

ENHANCED WORKFLOW ENGINE (BETA) / ENHANCEMENTS (SYSTEM FRONT END)

The enhanced workflow engine is being deployed to a SigniFlow Server near you as part of SigniFlow 2025. After the upgrade users will be presented with an updated dashboard and have access to the new functionality.



The updated dashboard provides all users of SigniFlow a single page from where they can access all aspect of the SigniFlow eSignature application.



Users will be able to access their profile directly from the landing page by clicking on their name and then make amendments as required.



Signature

Change signature design

Your signature will be placed on your business documents in the way it is displayed below. If you are signing a document that has not been sent out by your business, your signature may appear differently based on the originator's signature appearance settings.

Change font Draw Upload Basic signature

Current signature

Andre Minnaar

I accept this document

18/11/2024 14:04:51 (UTC+02:00)

Actual size (As per standard DocPrepper sizing)

Additional options

Include time Include signed by

Include date Include reason

Include middle names Show family name first

Initialise first names

Customising your signature appearance is as simple as clicking on the SigniFlow image on the landing page and making the desired changes.



If a user wants to revert back to the classic view of SigniFlow, it is as simple as switching the toggle switch at the top right of the screen. This will then automatically take the user back to the previous dashboard layout.

IMPORTANT: This will have to be done from the landing page.

FLOWNAMIX

Create new workflow

Upload a document and send it for approval and/or signature

+ Create new

63 PENDING	126 CIRCULATING	41 CANCELLED	1 EXPIRED
6 REJECTED	144 COMPLETED	79 DRAFTS	52 SHARED WITH ME
0 TEAM DOCS	165 PORTFOLIOS	133 DELETED	423 TOTAL
777 AVAILABLE			

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SIGNIFLOW

Andre Phillip Minnaar
andrem@signiflow.com

Drop documents here

W X P PDF

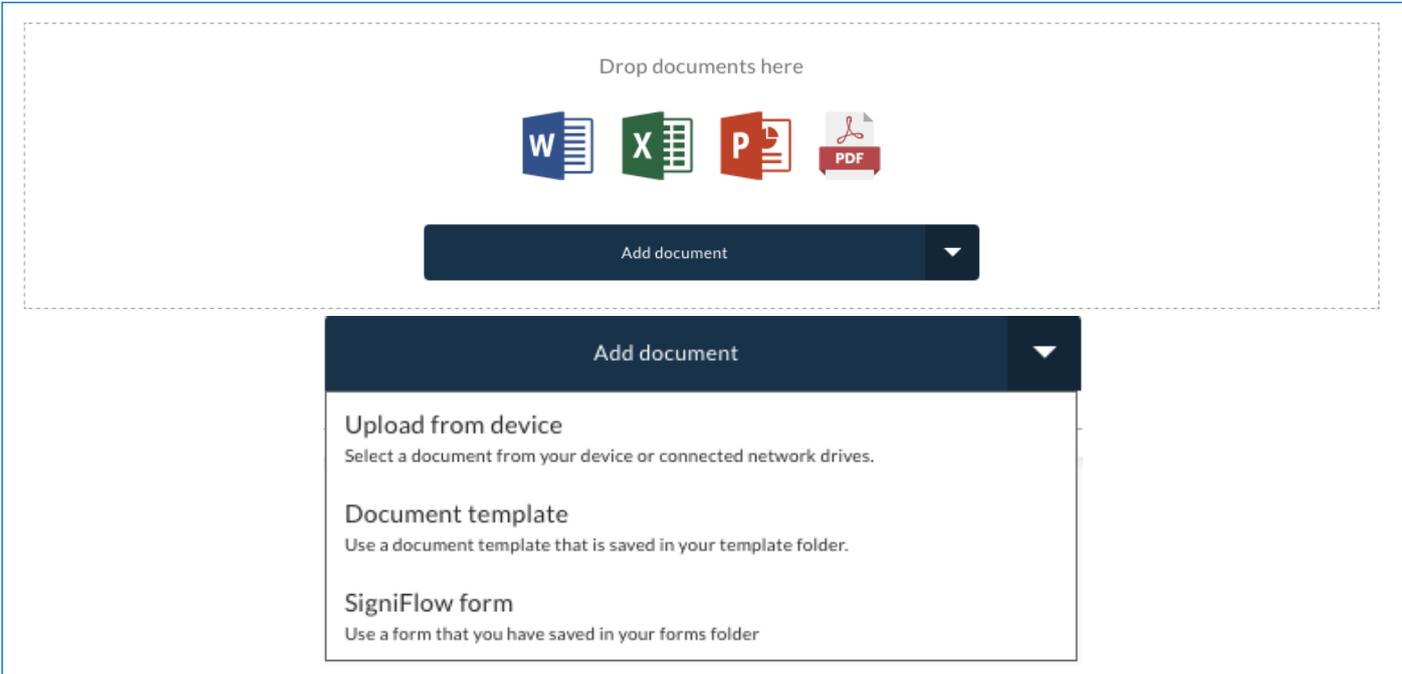
Add document

Try the new workflow engine.

A Minnaar

17/09/2024

New feature of SigniFlow 2025: In addition to accessing your Profile or editing your signature from the landing page, users will be able to create a workflow from the landing page.

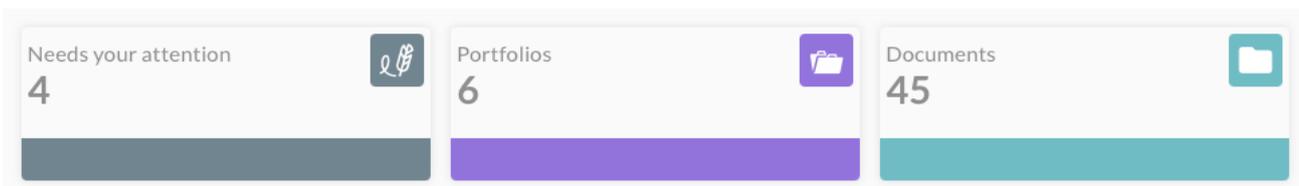


∞ Clients will be able to create a workflow from their dashboard in one of the following ways:

- Drag and drop the documents into the Upload document block.
- Click on the Add document tab and select one of the following options:
 - Upload a document from a file location on your local machine.
 - Make use of a document template that has been uploaded to SigniFlow (this feature is available to add users, but the System Administrator will need to upload the document to the system from the My Business section).
 - Make use of a pre-created form in SigniFlow.

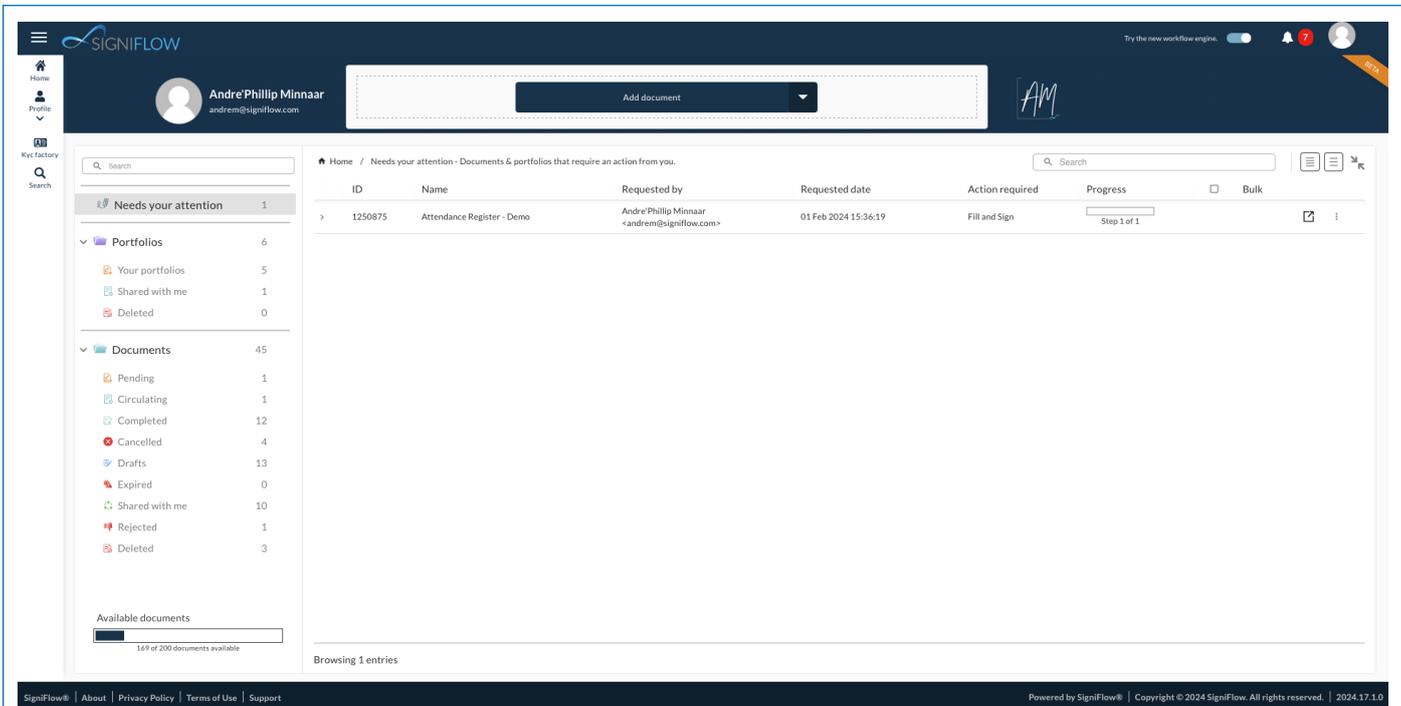
∞ One of the key system improvements is the ability for users to upload multiple documents in a single step using the drag-and-drop feature or the "Upload from Device" option, which now supports simultaneous uploads.

∞ The menu ribbon of SigniFlow has also become more interactive to our users and is a single page from where a user can access various aspects of the application.



∞ By clicking on one of the 3 basket options, you will be routed to as indicated below:

- **Needs your attention:** Will route the user to all the documents that require their specific action, similar to the pending basket on the classic view of SigniFlow.
- **Portfolios:** Will route the user to an overview of all their portfolios that have been created and give them the ability to view documents in these portfolios from an easy to access and view dashboard.
- **Documents:** The updated interface now provides a streamlined view of all documents and their statuses. This refreshed dashboard in the classic view of SigniFlow retains the same menu items but displays them in a simplified list format rather than the traditional dashboard with individual baskets. This change makes navigating between menu items more intuitive and user-friendly.



In addition to the 'Needs Your Attention' section, users have access to the following view:

Needs your attention 52 *	<p>Needs your attention view:</p> <ul style="list-style-type: none"> Shows the user all documents that require their attention.
Portfolios 6 <ul style="list-style-type: none"> Your portfolios 5 Shared with me 1 Deleted 0 	<p>Portfolios view:</p> <ul style="list-style-type: none"> Provides the document initiator with an overview of all their Portfolios and the associated documents in a user-friendly single page view.
Documents 45 <ul style="list-style-type: none"> Pending 1 Circulating 1 Completed 12 Cancelled 4 Drafts 13 Expired 0 Shared with me 10 Rejected 1 Deleted 3 	<p>Documents view:</p> <ul style="list-style-type: none"> The updated interface retains similarities to the previous SigniFlow Dashboard but introduces a streamlined, single-view layout. Designed for enhanced usability, this new interface allows document initiators to navigate more easily while providing detailed insights into document statuses and actions.

The updated SigniFlow dashboard has been redesigned to present all essential information in a single, streamlined view. From this dashboard, users can easily access the following:

- Document information.
- The action required on the document.
- The progression of the document.
- Users are now able to Bulk Sign documents from the Dashboard.

ID	Name	Requested by	Requested date	Action required	Progress	<input type="checkbox"/> Bulk sign	Actions
> 13141	AAA - DEMO - NEW FIELDS - Demo Agreement	Andre Minnaar <andrem@signiflow.com>	30 Oct 2024 07:06:08	Fill and Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>		
> 13043	AAA - DEMO - NEW FIELDS - Demo Agreement	Andre Minnaar <andrem@signiflow.com>	28 Oct 2024 14:53:47	Approve	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>		
> 9351	Attendance Register - Demo	Andre Minnaar <andrem@signiflow.com>	23 May 2024 11:30:37	Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>	<input type="checkbox"/>	
> 9148	AAA - DEMO - NEW FIELDS - Demo Agreement	Andre Minnaar <andrem@signiflow.com>	14 May 2024 07:42:02	Fill and Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>		
> 8969	AAA - DEMO - NEW FIELDS - Demo Agreement	Andre Minnaar <andrem@signiflow.com>	26 Apr 2024 14:42:27	Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>	<input type="checkbox"/>	
> 8162	Witness Signing Interim Solution - Investec	Andre Minnaar <andrem@signiflow.com>	08 Mar 2024 07:45:04	Fill and Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>		
> 8082	AAA - DEMO - NEW FIELDS - Demo Agreement	Andre Minnaar <andrem@signiflow.com>	04 Mar 2024 14:35:38	Fill and Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>		
> 8081	AAA - DEMO - NEW FIELDS - Demo Agreement	Andre Minnaar <andrem@signiflow.com>	04 Mar 2024 14:31:19	Fill and Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>		
> 8018	AAA - DEMO - NEW FIELDS - Demo Agreement	Andre Minnaar <andrem@signiflow.com>	27 Feb 2024 13:21:18	Fill and Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 2</div></div>		
> 7828	Attendance Register - Demo	Andre Minnaar <andrem@signiflow.com>	09 Feb 2024 17:11:56	Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>	<input type="checkbox"/>	
> 7815	AAA - DEMO - NEW FIELDS - Demo Agreement	Andre Minnaar <andrem@signiflow.com>	08 Feb 2024 11:48:37	Fill and Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>		
> 7808	AAA - DEMO - NEW FIELDS - Demo Agreement	Andre Minnaar <andrem@signiflow.com>	08 Feb 2024 10:18:57	Fill and Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>		
> 7622	AAA - DEMO - NEW FIELDS - Demo Agreement	Andre Minnaar <andrem@signiflow.com>	26 Jan 2024 08:12:32	Fill and Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>		
> 7428	Master Services Agreement V5 12122023	Andre Minnaar <andrem@signiflow.com>	15 Jan 2024 12:19:53	Fill and Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 2</div></div>		
> 7277	Attendance Register - Demo	Andre Minnaar <andrem@signiflow.com>	09 Jan 2024 08:32:38	Fill and Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>		

Browsing 60 entries

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Document information: Shows the user the Document ID, the name of the document and the date the document was created.

Action required: Shows the user what action is required on the document, giving the user a quick and easy view of what action needs to be taken on the document.

Status / progress of the document: Show how many steps have been taken and how many still need to be taken.

Bulk actions: Users are now able to bulk sign a document from the dashboard instead of having to open the document individually.

Additional actions: Users can open and download documents from the dashboard.

These features are generally available across all options within SigniFlow, with slight variations depending on whether you're working with documents or portfolios.

ID	Name	Requested by	Requested date	Action required	Progress	<input type="checkbox"/> Bulk sign	Actions
13565	AAA - DEMO - NEW FIELDS - Demo Agreement	Andre Minnaar <andrem@signiflow.com>	13 Nov 2024 09:33:24	Fill and Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>		

Preview
 Audit log
 Workflow information
 Geolocation

For each document within the system, drilling down into the document reveals additional enhancements. These are designed to provide users who created the documents with more detailed information, particularly about the document's status and any completed or pending actions.

ID	Name	Requested by	Requested date	Action required	Progress	<input type="checkbox"/> Bulk sign	Actions
1250875	Attendance Register - Demo	Andre Phillip Minnaar <andrem@signiflow.com>	01 Feb 2024 15:36:19	Fill and Sign	<div style="width: 100%;"><div style="width: 100%;">Step 1 of 1</div></div>		

Preview
 Audit log
 Workflow information
 Geolocation

Attendance Register - Demo

ATTENDANCE REGISTER

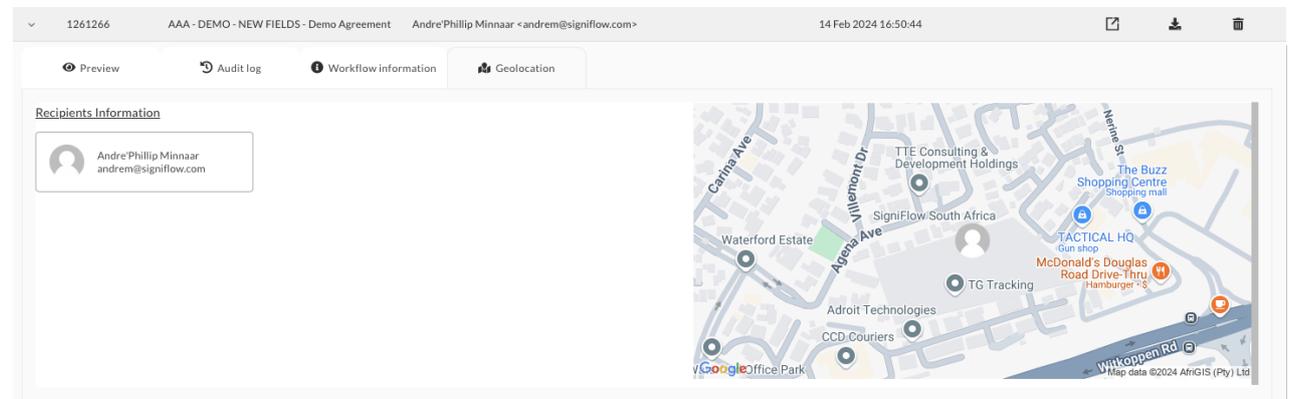
Users can now preview documents directly from the dashboard, with actions reflected in the preview for added convenience.



Users can view the document's audit log at a specific point in time and download a copy if needed.



The workflow information can be displayed.

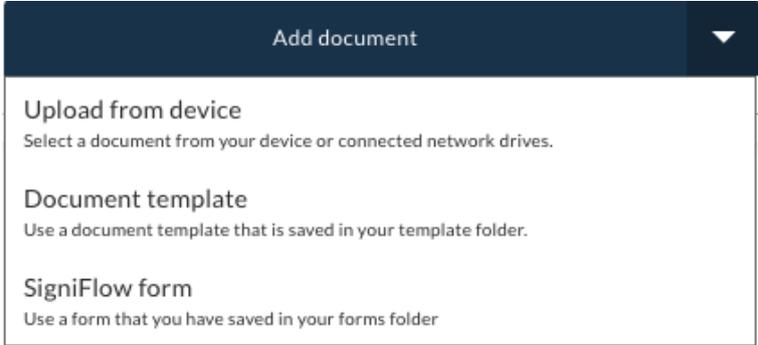
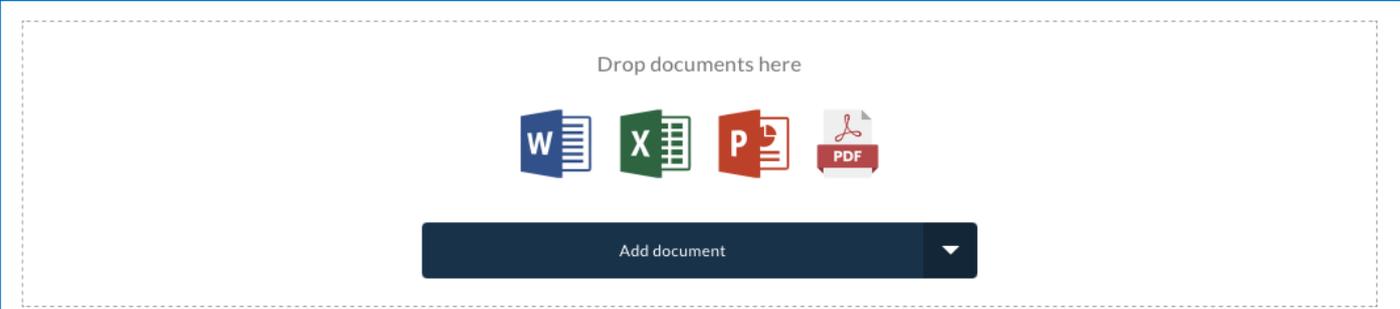


If location settings are enabled, a map showing the user's location at that specific point will be displayed.

Available documents

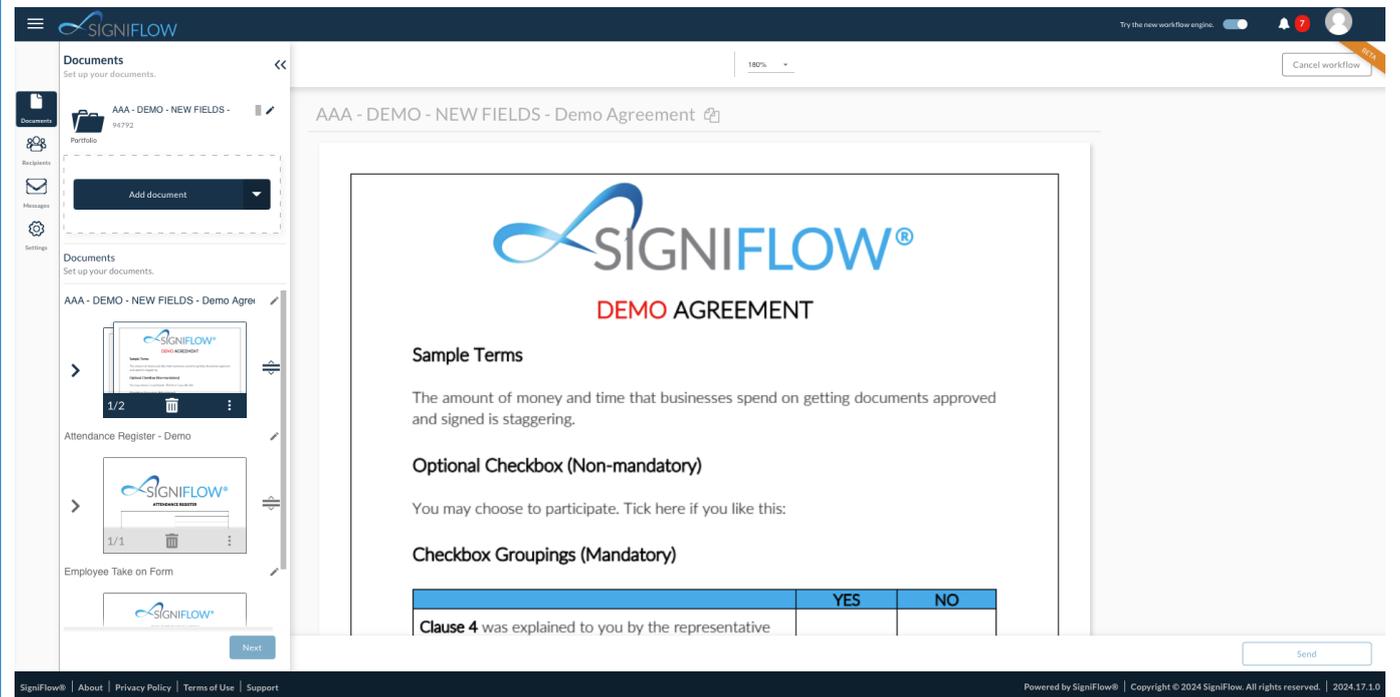


The available documents are displayed in a bar format.

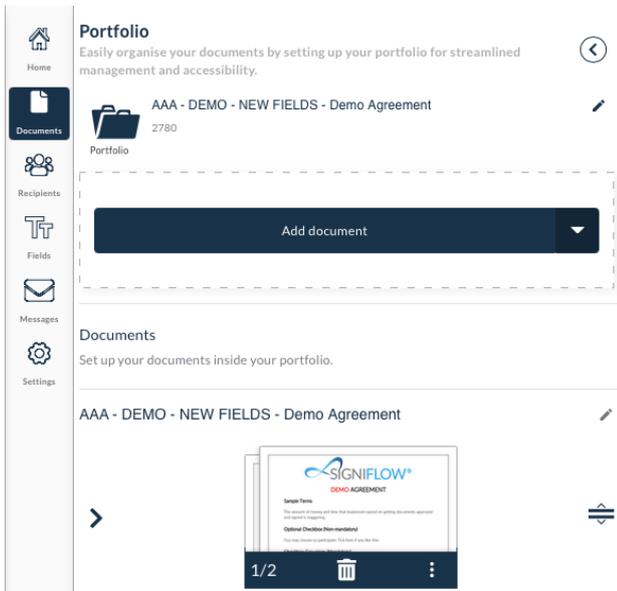


When uploading a document to SigniFlow for workflow processing, users of the enhanced workflow engine will experience an improved user interface designed to streamline the process and reduce the time required to send documents for signing.

Once a document is uploaded to SigniFlow, it is automatically added to a SigniFlow Portfolio. If multiple documents are uploaded, they are grouped within the same Portfolio but managed as individual files. This marks a significant improvement with the enhanced workflow engine, as previously, multiple documents were combined into a single file, regardless of the number uploaded.

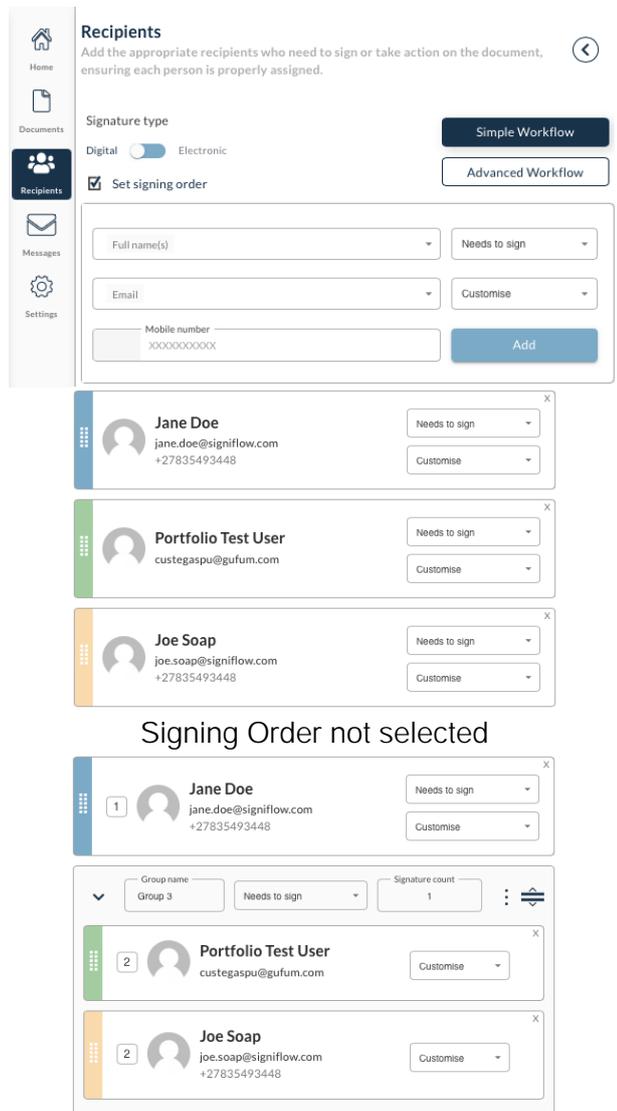


Once the document(s) are uploaded, the user will be presented with a single screen from which they can add recipients, add a custom message to the Portfolio, and assign settings that are associated with the Portfolio.



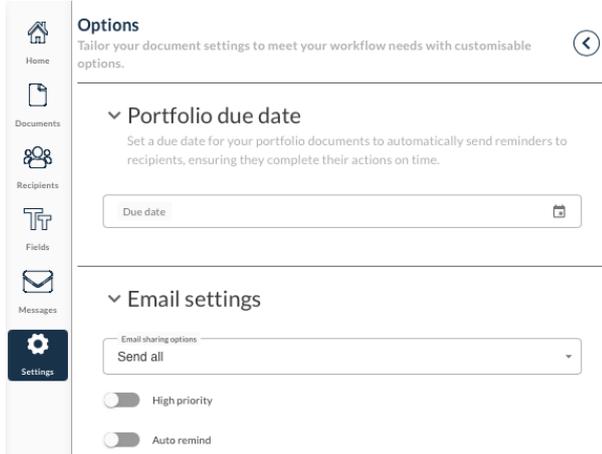
Documents :

- User can rename the Portfolio as well as the document, by clicking on the pen icon next to each.
- Additional documents can be uploaded to the Portfolio by clicking on the add document button.
- The order of the documents can be amended by dragging the document into the correct order.
- Documents are shown as indicated to the left, from this section, the user will see the number of pages and can also delete the document if required.
- Clicking the arrow next to the document expands from a thumbnail to a full view, displaying all individual pages. Clicking on any specific page will direct the workflow initiator to that exact page within the document.
- The three dots on the bottom right of the document are additional options specifically linked to that document.



Recipients :

- Users can select the type of Signature that is required (Digital or Electronic), the default setting of the business profile will always be the default.
- Users now can select the following type of workflows, via the Set Signing Order check box:
 - Parallel - This allows a user to action a document in any order, but with fields that are allocated specifically to them, this workflow option is only available if the Set Signing Order checkbox is not selected.
 - Group - Similar to Parallel signing, but there is no order or specific field allocation to any order.
 - Sequential - Where users must complete the action allocated to them in a specific order, before the next user will be presented with the document for them to action.
 - Users still can combine the Group and Sequential signing orders within one workflow.
- To add a person to a workflow, simply click on the Full name(s) field and start typing, or complete the fields required manually as before.
- Users can now search on Name / Surname and Email address.
- Individual actions can be allocated to an individual user via the Additional Drop-down blocks when adding a user.



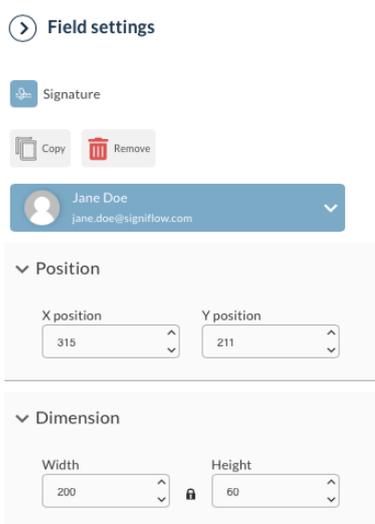
Settings :

- ∞ Provides the user the ability to set the following fields:
 - **Portfolio Due Date .**
 - **Email Settings :**
 - Define who needs to get the notifications.
 - Set the Priority of the workflow.
 - Enable the auto remind function, where a reminder will be sent out daily to the person that needs to action the document.

Additional functionality added to SigniFlow for document initiators is outlined below.



- ∞ Each document uploaded onto SigniFlow is kept separate, allowing the document initiator to perform individual actions on each document. The available options are located above the document in the blue ribbon and include:
 - Apply a workflow template that has previously been saved.
 - Apply a form template that has previously been saved.
 - The user can save a workflow template or form template, if required.
 - Scan the document for any auto tagging that has been applied to the uploaded document.
 - Delete the document.
 - Set the document visibility.
 - Copy the document information.



- ∞ Under the field settings option, users can amend aspects of fields that are applied to a document:
 - Users can copy or remove a field.
 - Reassign a field to another user, if required via the drop-down option of the user.
 - Change the position of the field via the X / Y positions.
- ∞ Change the dimensions of the fields.



Users can now copy and paste fields directly onto a document. This functionality allows users to select a field and create a duplicate of it on the document. While the feature is similar to the options available under Field Settings, it is conveniently located on the ribbon menu above the document for quicker access.



Once the workflow has been created and is ready to be released, the user can simply click on the Send button and this will release the workflow.

At any stage during workflow creation, users can release the workflow, provided users and fields have been added. This can be done using the **Send** button located at the bottom right of the screen.

Document Information

Forward-Looking Statements

This plan may contain "forward-looking" statements that are based on management's beliefs and assumptions and on information currently available to management and which statements involve substantial risk and uncertainties. Forward-looking statements include all statements that are not historical facts and can be identified by terms such as "may," "will," "should," "expects," "plans," "anticipates," "could," "intends," "target," "projects," "contemplates," "believes," "estimates," "predicts," "potential," "continue", "forward projection", "around", "considered", or "conservative" or the negative of these words or other similar terms or expressions that concern our expectations, strategy, plans or intentions. These statements are subject to substantial risks and uncertainties that could cause actual results to differ materially from those expressed or implied by such statements.

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Released 2022- SigniFlow updated branding to SigniFlow.