Table of Contents

Word template

A Word template is a document you create in Word or an existing one which you wish to reuse. It can be any type of document within Word. We recommend you spend some time thinking about how you work with the document before you start exchanging text for placeholders. This is important, because at times you might be asking for information, because you can, but you might end up with the same input, so it's better to leave it fixed text. You can make several templates for different purposes. You also have the option to prefill a placeholder, should you wish a more versatile document. So, let's run through it:

1. Open an existing document (skip 2nd step) or start a new one.
2. Write out your document, insert tables, textboxes or whatever you need. Your document can be as long and with as many pages as you need it to be.
3. Think about how you're working or wish to work with your document.
4. Next step is to identify the text you wish to turn into questions for the different users. Could be a good idea to mark it or you could start from one end.
5. Now we get to insert the placeholders. To get started on this, let's look at what a placeholder is and what it does.
    - 5.1. A placeholder is a piece of text with some identifiers for our system to recognise it. At AuthorizeDoc this looks like this: ${placeholder_name}. Please look at the example on the right to get an idea of what these looks like. They are marked with the colour yellow.
    - 5.2. A placeholder will prompt the user assigned to it a question. We have different formats to ensure you're getting the answer you're looking for. We will have a closer look at this during the tutorial on the Template Setup. For now, you just need to understand the text highlighted with yellow will be replaced by the user input. Nothing of the text highlighted with yellow will remain.
    - 5.3. Finally, we have special placeholders which has a specific function assigned to it. You'll learn about this in the tutorial on placeholders.
6. Have a read through your document and if you're satisfied with your placeholders, save it to be able to upload it to our system.

EXAMPLE

${first_name} ${last_name}
${address_1}
${address_1}
${ZIP} ${city}
${state}

Dear ${first_name},

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna.
Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus.

Sincerely

${sender_signature}	${receiver_signature}
${sender_full_name}	${receiver_full_name}

BEFORE

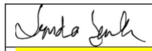
EXAMPLE

Receiver Receiversen
Receiver Street
Receiver Street
08001 Test City
Exam state

Dear Receiver,

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna.
Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus.

Sincerely

	
Sender Sendersen	Receiver Receiversen

AFTER

Placeholders

A placeholder is a piece of text with some identifiers to help our system find them in your document. At AuthorizeDoc our identifiers look like this: ${}. Without these, our system can't find them, so these are mandatory. You can put whichever name you wish in-between them. This is a good example of what it could look like: ${placeholder_name}.

What happens when our system scans your document is that it'll grab all the placeholders and display them for you in the Template Setup, more on this in Template Setup tutorial.

When inserting your placeholders, it's wise to name them in matter that'll make you remember where they are and what they're for. If you're wanting to ask for a customer's full name, you could replace the text/space with ${costumer_full_name} or perhaps ${Customer_name} ${customer_surname} if you wish to break them up.

All the placeholders will be completely replaced with the input you're asking for (As shown in the Word Template tutorial). This is a big advantage of using placeholders instead of drag/drop of boxes on top of a document. You will keep the same format, spacing, line and the surrounding text adapts to the input. In the end, you'll not be able to see what has been replaced. It'll simply look like it's always been there.

Please find below a list of some common placeholders and a list of special placeholders, which are assigned to specific functions within our system.

Placeholder overview

Some common ones, but again, you can call them whatever you like:

${full_name}
${first_name}
${last_name}
${address}
${post_code}
${city}

Here's a list of specific placeholders, which have a function within the system, as well as the function assigned to them. What does this mean? If you use any of these placeholders, you, or any of the other users of this specific document will not be prompted for an input. The system will automatically fill this based on information already existing:

${from_name} [Inserts the name of the one chosen as sender]
${from_email} [Inserts the email of sender]
${from_title} [Inserts the title of the sender]
${from_company} [Inserts the name of the company chosen as sender]
${from_company_address_1} [Inserts the 1st address line of the sender]
${from_company_address_2} [Inserts the 2nd address line of the sender]
${from_company_city} [Inserts the city of the sender]
${from_company_country} [Inserts the country of the sender]
${from_company_postal_code} [Inserts the postal code of the sender]
${from_company_state} [Inserts the state of the sender]
${from_company_vat_id} [Inserts the VAT of the sender]
${to_name} [Inserts the name of the one chose as receiver]
${to_email} [Inserts the email of the receiver]
${to_title} [Inserts the title of the receiver]
${creator_name} [Inserts the name of the one creating the document]
${creator_email} [Inserts the email of the creator]
${creator_title} [Inserts the title of the creator]

It's important to remember, that if you name any of your placeholders like the above functions list, you will trigger this function and NOT a prompt for the user.

Finally, you're able to help our wizard and yourself along, by using "sender", "receiver" or "recipient" in your naming. An example could be:

${sender_age} or ${receiver_signature}

Doing this allows the wizard to already suggest who is going to answer the prompt in the setup, but more on this later in the tutorial on Template Setup.

Signatures

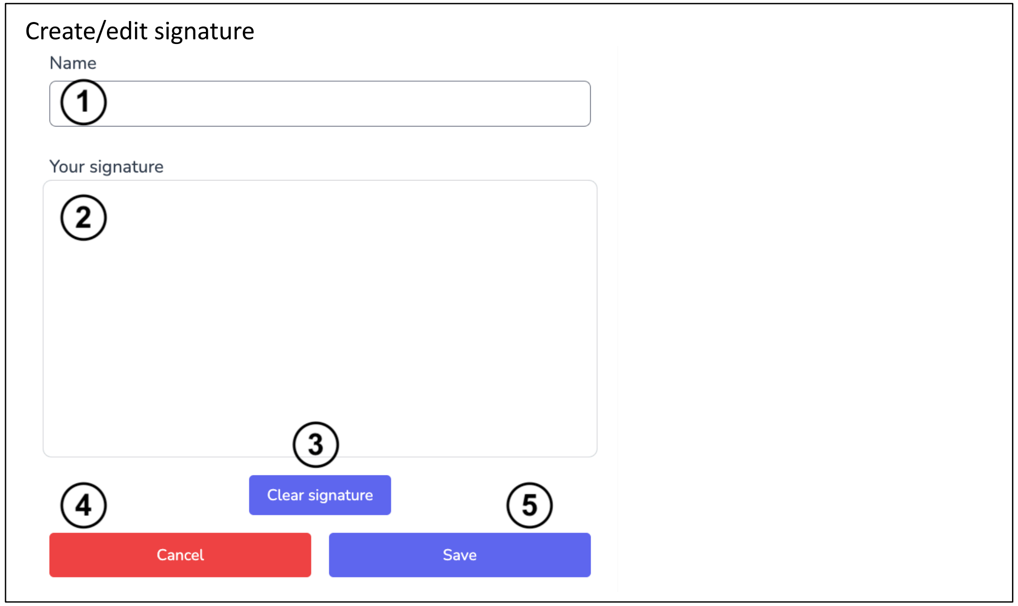
How to create and save your signature in AuthorizeDoc for future use. You can store several signatures if you deem it necessary. When creating a document, you can choose to automatically add it.

Getting started

1. Go to “signatures” in the main menu on the left.
2. The “action” presents you with 2 options.
   2.1. “Create signature” will prompt the “create/edit signature”.
   2.2. “Upload” let’s you upload an already existing signature to AuthorizeDoc.

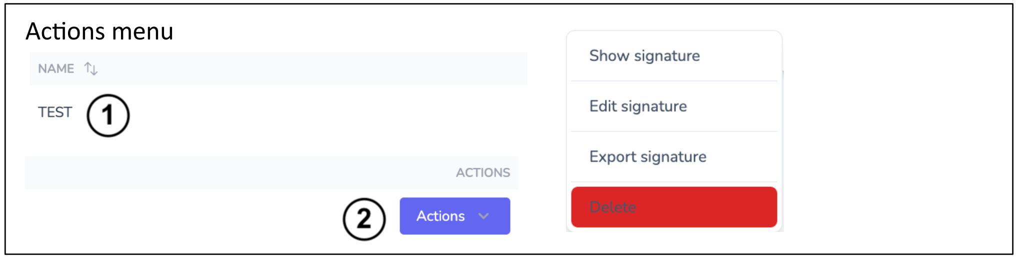
Create/edit signature

1. Name your signature.
2. Create your signature on trackpad, touchscreen or with a mouse.
3. Clear the field above if you’re not happy with the result.
4. Cancel in case you’ve changed your mind and do not want to create a signature right now.
5. Save your signature and you’ll be able to use it in the future.



Actions menu

1. Your different signatures will be displayed here.
2. The action button allows you to take several actions on your signatures.
   2.1. “Show signature” will display a box with a view of your signature.
   2.2. “Edit signature” prompts the “Create/edit signature” function.
   2.3. “Export signature” exports your signature as a .png file.
   2.4. “Delete” does exactly that.

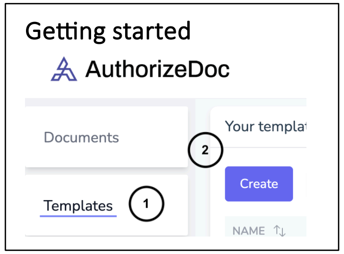


Template Setup

Now it's time to upload our Word template with all the placeholders we think we're going to need.

Getting started

1. Go to templates under your profile.
2. Hit create.



Uploading Word template

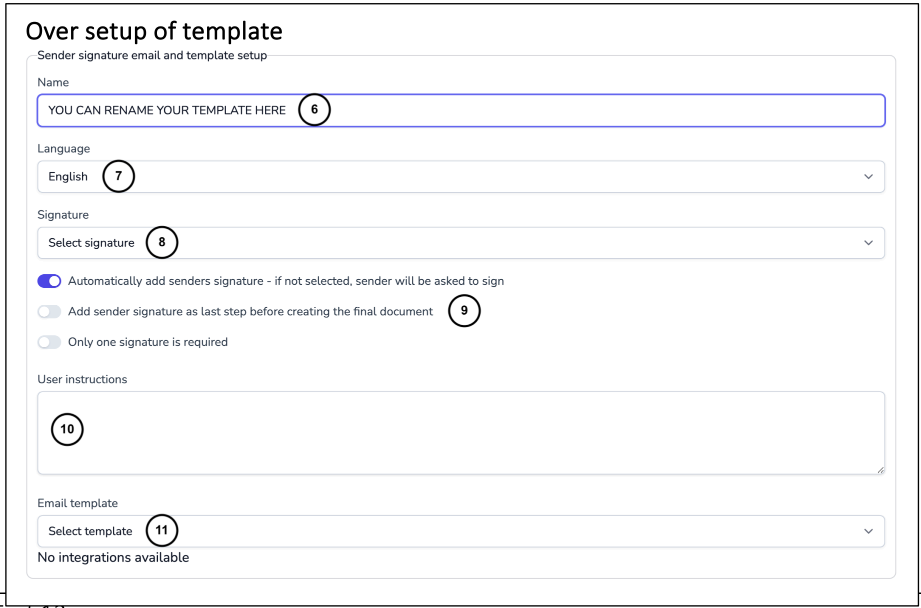
3. You'll be prompted with a window asking you to select your Word template.
4. Please name your template.
5. Once you're happy with it click "upload"

The system will then take you to the Template setup menu.

Overall setup of template

This upper part has to do with the overall setup of the template.

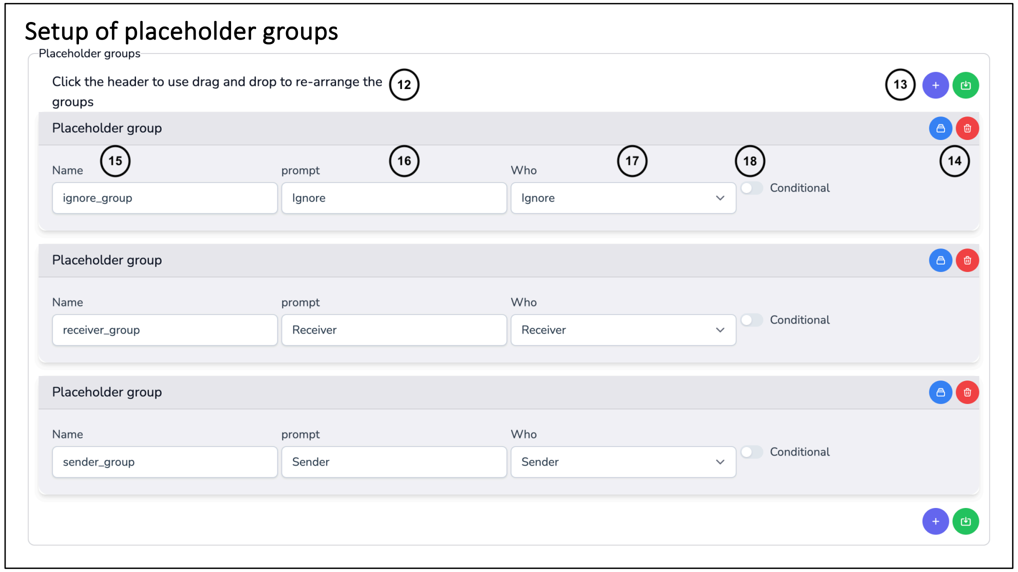
6. You can rename it if you've made a mistake.
7. Select which language you wish the communication to be in. These are the email communications done by the system to each user.
8. If you have already made a signature and saved it, you'll be able to select it here. (If you do not have any signatures, the screen will look a little different) See the section about signatures for instructions on how to add signatures.
9. The next 3 options have to do with the order and necessity of signatures.
   - 9.1. The first option triggers the sender signature to be automatically added.
   - 9.2. The second option is used if you prefer the sender signature to be added after all the others have been done. If you can imagine situations where you might prefer to sign last, this is the option to use.
   - 9.3. The final option is if only one signature is required.
10. You can leave some instructions for the users.
11. If you have made and saved email templates, you will be able to choose them here.



Setup of placeholder groups

The middle part of the setup lets you create, rearrange, rename, and delete placeholder groups. You use placeholder groups to help organise the placeholders and to assign who does what.

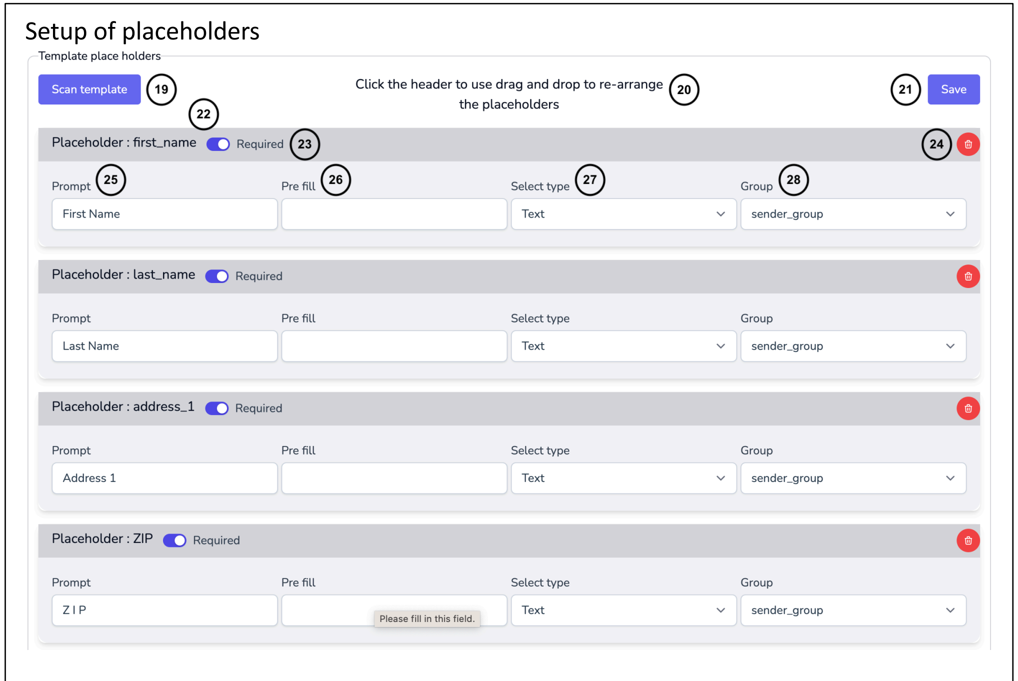
12. To rearrange your placeholder groups, click the header (dark grey) and use drag/drop.
13. To save or add placeholder groups use the purple (add) and green (save).
    Note: It is important that you save placeholder groups before you can use them.
14. If you would like to include all existing placeholders in a specific group you can do this (blue) on the opposite if you're sure you don't need a group, you can delete it (red).
15. You can name your groups to give them meaning for you. This isn't visible to the users, so it's more for you to organise your placeholders.
16. The prompt is where you're able to "communicate" with your users. This is visible as a headline for the placeholders within the specific group. E.g.: Prompt: "Please fill in below with your personal data". This would be the headline of the group and your placeholders could ask for name, surname, address etc.
17. The who is to which user you wish to request the answers. You have several options here:
    17.1. Sender (which is the one selected as the sender)
    17.2. Receiver (priority one receiver)
    17.3. Recipient (all other who you wish to interact with the document) You can have as many as you like. If you want the recipients to fill out information in the document, they each need to have their own group assigned to them.
    17.4. Ignore (This will not display for anyone, typically used for document ID, date stamp etc.)
18. Finally, you have the option to make the group conditional of the question in the prompt. When you use this function, it's important to fraise your question in the prompt (16) so the user is able to answer. The placeholders in a conditional group will only be displayed in the case the answer to the question is "YES".



Setup of placeholders

The final part of the template setup is related to the actual placeholders. This is where you define what they do and to who.

19. If you find any placeholders missing (because you haven't created it or perhaps made a mistake in the Word template), you are able to scan the Word template again and new or amended placeholders will be added. When using this function, your settings in the setup will be reset, so you'd want to do this at the very start.
20. As well as with the placeholder groups you can use drag/drop to move placeholders around. This affects the order in which they are presented to the user they are assigned to.
21. Save your setup and start using it. This button is also visible at the very bottom of the placeholders.
22. The placeholder’s name refers to the name you gave it in the Word template, so what you put between ${here}
23. You can choose whether a placeholder is required or not. If it is set to required, the user it is assigned to can't skip it. They must fill it out. If it isn't set to required, the user will still be prompted, but can skip the question.
24. Delete placeholders you no longer need.
25. The prompt is very important, this is the question which will be shown to the user. You have a maximum of 254 characters to define your question. We recommend you keep it short and precise, but at the same time long enough to leave no doubt about what the question is.
26. If you have placeholders where the answer is likely to be the same most of the time, you could use the prefill function to have it prefilled. The user assigned to it, will still be able to change the answer.
27. You can assign different functions to a placeholder, please see illustration on the right.
28. Assign the placeholder to a group. All placeholders must be member of a group. The group assigns a user to the placeholder.



Functions of placeholders

Type	Description
Text	A line of text, max 254 characters
Number	A number, 0...1 without decimals
Date	A date
Checkbox	A checkbox, the result will be 'X' in the document
Signature	A signature field, will insert the signature
MultiText	A multiline field for lager text
YesNo	A Yes / No selection
Decimal	a number with decimals
UploadPDF	Gives the possibility to upload a pdf file
UploadImage	Gives the possibility to upload a pdf file
Email	A email field, to ensure that the entered value is an email address
Today	A date filed with todaty's date

Template finished.

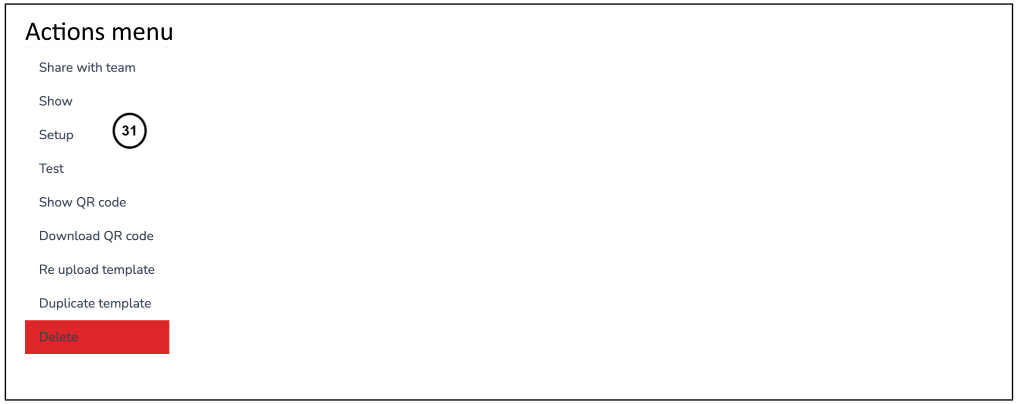
Your template is done and ready for use.

29. The template is displayed under your template's menu. You can filter on name, created and team.
30. You have different actions you can take on your template, these are explained in the next section. It is a drop/down menu.

Actions menu

You can always make changes to your templates. To do this you need to use the action button as mentioned in (30).

31. Template actions drop/down menu.
    31.1. **Share with team** (Share your template with your team)
    31.2. **Show** (Look at what your template looks like)
    31.3. **Test** (Test your template to see what it looks like when filled out)
    31.4. **Show QR code** (You can generate QR codes to use to direct users to your template and have them fill it out, this function only shows it. The QR codes are useful for templates where you're asking the receiver for some information and perhaps a signature, like a consent to data protection form)
    31.5. **Download QR code** (download the code, so you can display it somewhere else or print it out)
    31.6. **Re upload template** (This function is very useful when making changes to your Word template and wish to implement them in your current online template. This also allows you to change the graphics as well as the placeholders, as opposed to "Scan Template", described in point (19).
    31.7. **Duplicate template** (Make a copy of your template)
    31.8. **Delete** (Deletes your template)



Email templates

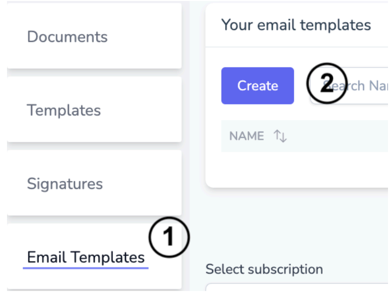
An email template gives you the ability to integrate your own design into the email going out to your users. There are some standard features you can't change, but the design is mainly up to you.

NOTE: You do not need to create email templates. If you do not create any, the standard email templates will be used.

Getting started

1. Go to “Email templates” in the main menu on your left.
2. Click “Create” which will prompt the setup of the email template.

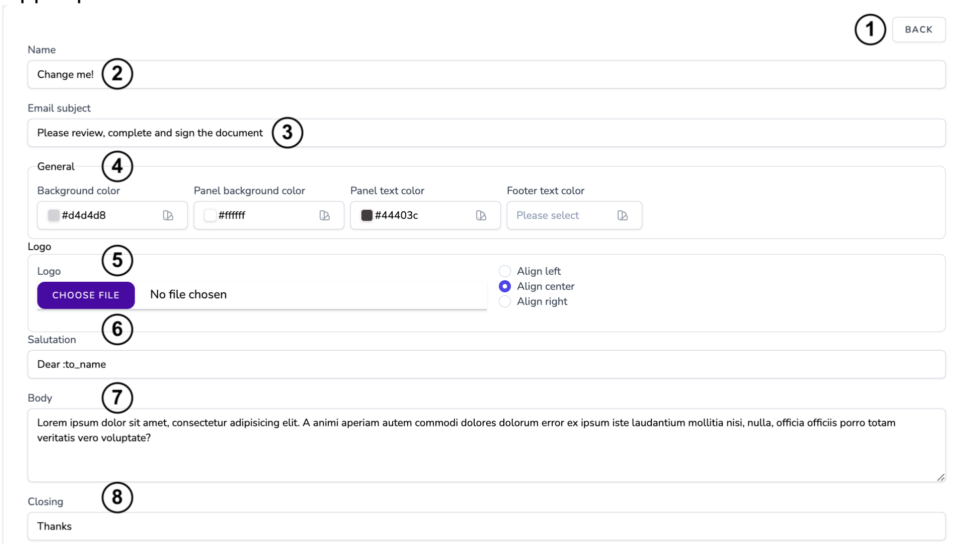
Getting started



Upper part

1. If you have entered this setup without wanting to, hit “Back”.
2. Give your email template a name.
3. Change the email subject.
4. Change the background, panel, panel text or footer text colour of the email.
5. Insert your logo by uploading it. You can align it in 3 different ways.
6. Change the salutation text. Do not change “to_name”, this will insert the name you fill out as the receiver automatically.
7. Fill in any text you like to show the user.
8. Change the closing statement of the email.

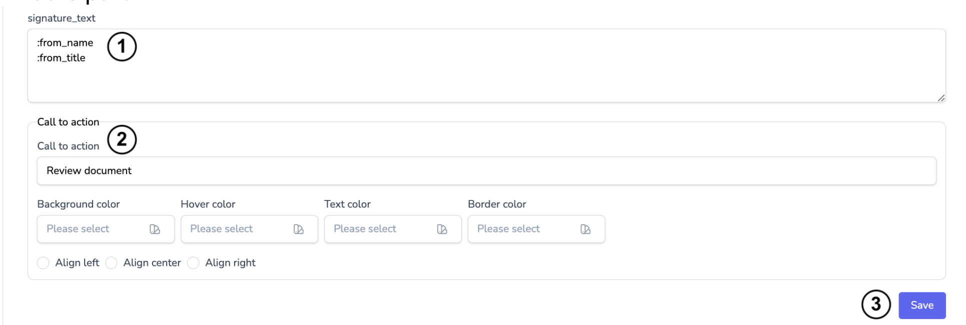
Upper part



Middle part

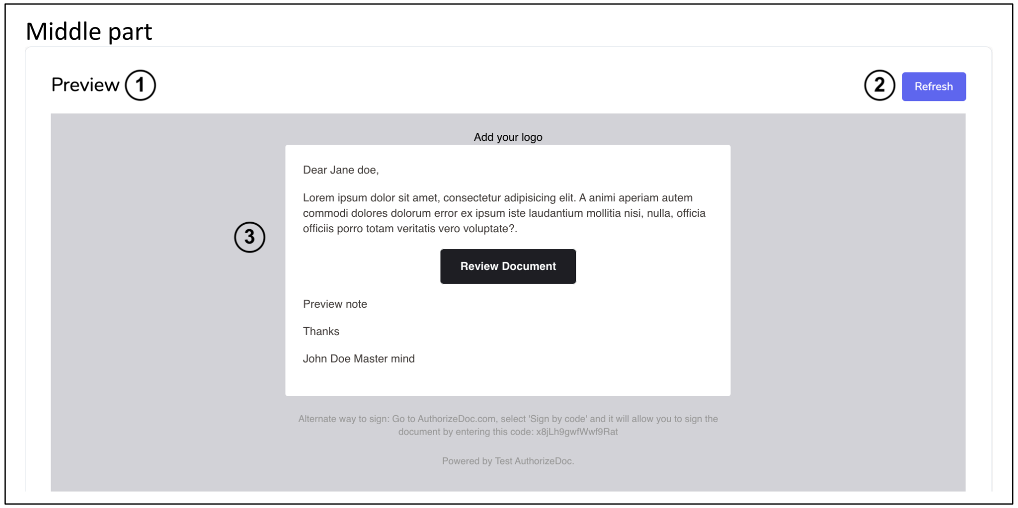
1. The signature text will automatically insert “sender name” and “sender title” unless you delete it. You can add text around it.
2. Change the text, colours and alignment of the “call to action” button.
3. Save your email template.

Middle part



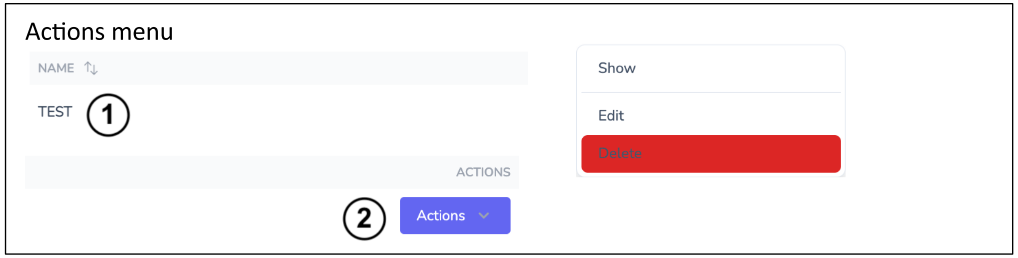
Preview

1. This is a preview. You're not able to make any changes to this part.
2. Once you have made the desired changes in the 2 sections above, hit the refresh button to see how it is going to look.
3. This part will update with the changes you have made, when you refresh.



Actions menu

1. Your new email template will be displayed here.
2. On the right side of the screen, you can take several actions on your email templates.
   2.1. "Show" shows you the preview you were able to generate when creating or editing the email template.
   2.2. "Edit" let's you jump back in and make changes.
   2.3. "Delete" if you do not want to keep your email template any longer.



Document

You can create a document without any of the prior steps, except for the Word template. AuthorizeDoc features the possibility of creating a document directly from a Word document. If all you need is a signature, you just need to add this placeholder and you're ready.

Getting started

1. Select "Documents" in the main menu on your right.
2. Click "Create" and you're presented with 2 options.
   2.1. "From template" let's you create your document from one of your previously made Word templates.
   2.2. "From document" will create a new document directly from a Word document with placeholders.

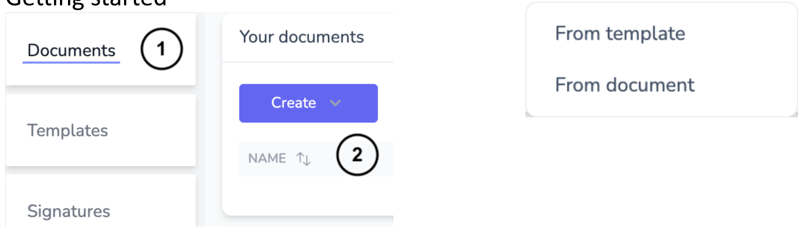
Create from template

1. Select the template you wish to start from.
2. Click next to start the creation process.

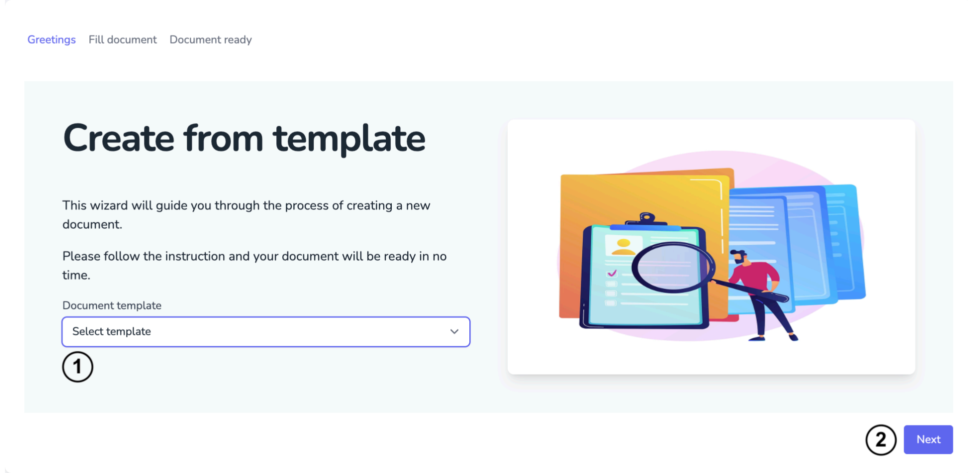
User setup

1. Name your document. This is what you and everyone else involved is going to see.
2. Creator information. Name, email, and title will be displayed here. The creator is the user logged in and creating the document.
3. Decide if sender is the same as creator. If not, you need to fill in name, email, and title if needed.
4. Receiver information. This is the only required person who will receive the document. Again, you need to fill in, name, email, and title if needed.
5. You can add as many recipients as you like.
   5.1. You need to fill in name, email and if needed title.
   5.2. If you need them to fill out information in the document, they need to each have a specific group assigned to them, as explained in the section "Setup of placeholder groups". You choose the group of information in "Data group".
   5.3. If they are expected to sign, you can choose where their signature goes in the field "Signature placeholder".
   5.4. When you're done, you need to make sure to add them by clicking the "green plus".
6. All recipients you've added will be displayed here.

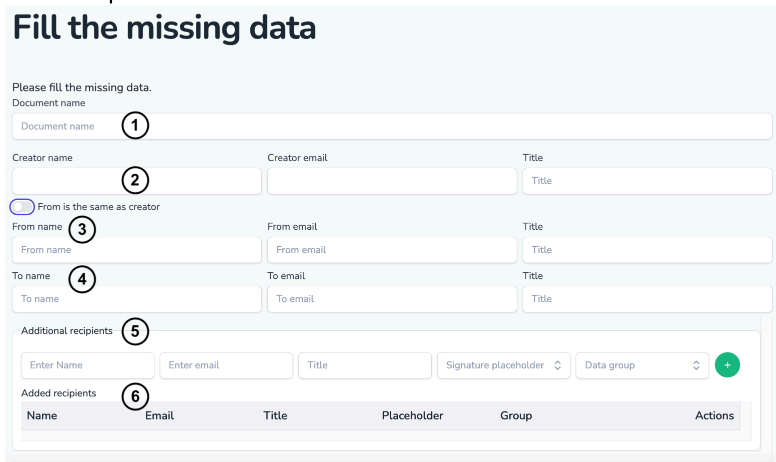
Getting started



Create from template

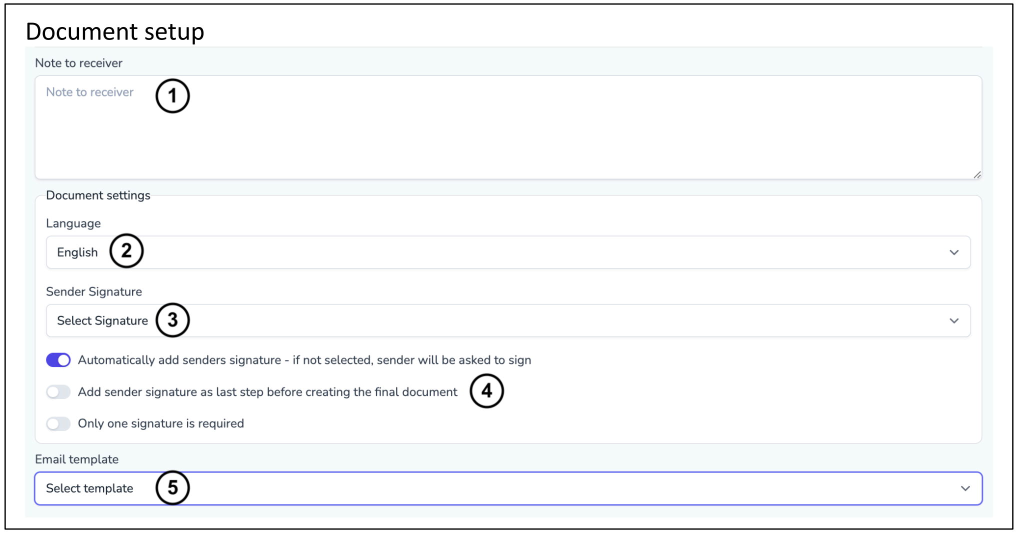


User setup



Document setup

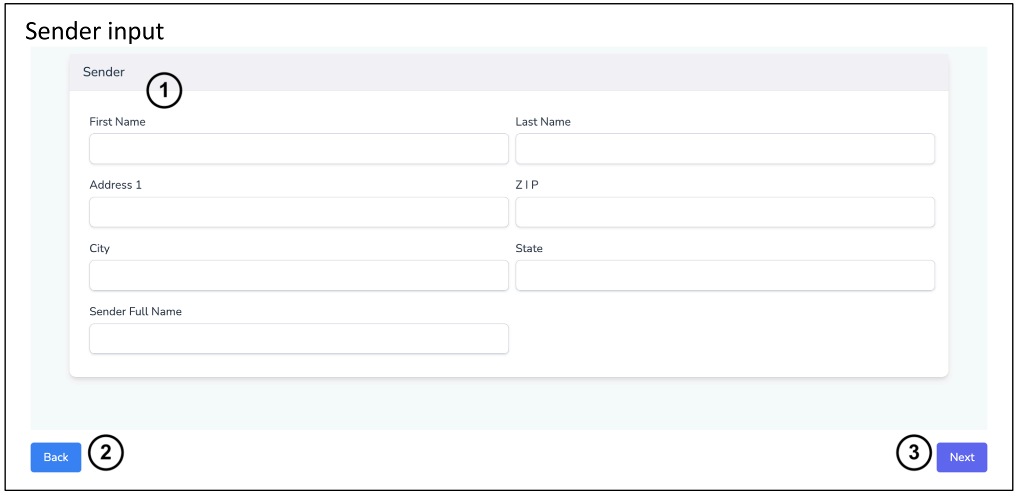
1. Write a note to the receiver if you wish to explain something more in detail or send a message.
2. Select the language for the emails going out to the different users.
3. If you have already saved a signature (check section for "Signatures"), you will be able to choose it here.
4. Setup how you want the flow of signatures:
    4.1. Automatically add sender's signature
    4.2. Add sender's signature as last step. Sender signature will be added when everyone else have signed.
    4.3. Only one signature required, is a function you can use when only 1 person's signature is enough.
5. If you have already made and saved an email template (check section for "Email templates"), you will be able to choose it here.



Sender input

This is the last chance to make changes before sending the document. You will still be presented with an overview to double check some of your information, but no changes can be made.

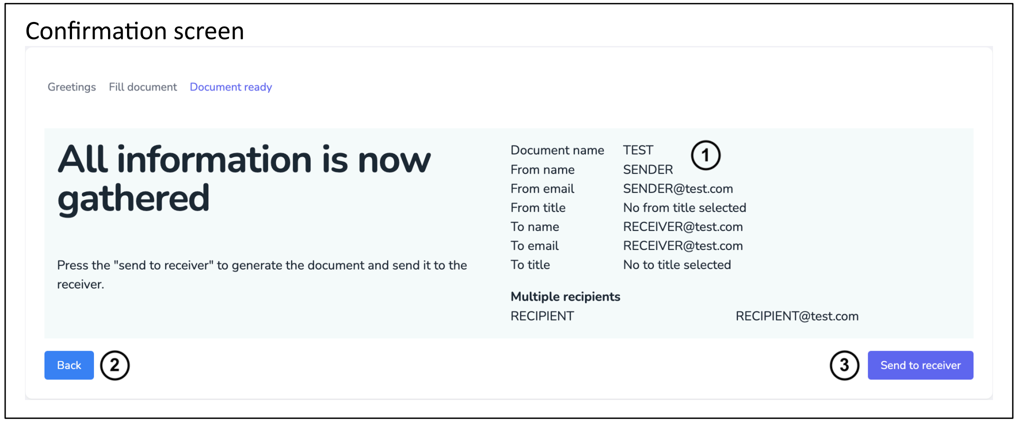
1. This part is for sender to fill out the placeholders assigned. If you have chosen automatic signature, this will be added without sender being prompted. If you haven't, depending on whether you opted for the sender signature to added last or not, the sender will be prompted to sign accordingly.
2. If you regret starting the document, you can always go back.
3. If you're done and wish to send, click next, which will prompt the overview, for you to check your data.



Confirmation screen

This is a screen confirming some of the choices you've made. This is also the last chance to go back and make changes before sending.

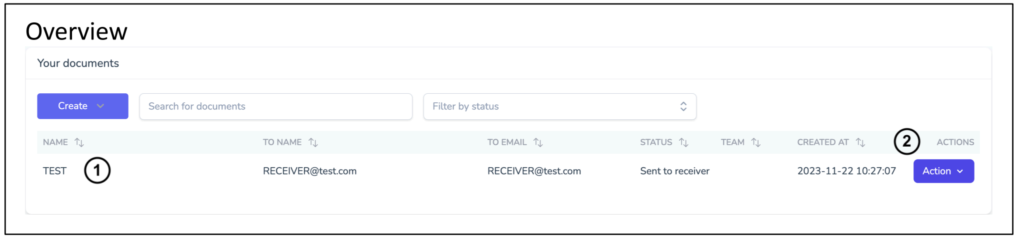
1. Please double check your information.
2. If you're not happy, go back and make the necessary changes.
3. Send your document and have it pass through the process of signing.



Overview

This is the overview where your document will figure once sent.

1. You will be able to filter to find documents and track the progress.
2. You have several actions you're abler to take on your documents.



Actions menu

1. "Show document" only shows up when the document is finished, meaning well all who must sign, have done so. It shows you the document, but without the final formatting, so it doesn't look as neat as the downloadable document.
2. "Download document" downloads your copy of the document. All copies downloaded are identical to the original document and will all have a digital seal. This function is removed once every user has downloaded. We (AuthorizeDoc) do not store final documents, once downloaded.
3. "Send to receiver or recipients" let's you resend the link to download the document. We do not include any actual documents in our emails. If the document hasn't been finished yet, you're able to resend for input and signature instead.
4. "Tracking" is available during the process and when finished. See under illustration for tracking.
5. "Delete" document. This is irreversible, so you will be prompted to see if you're sure.