DOCUMENT.ONLINE

General information and service instructions

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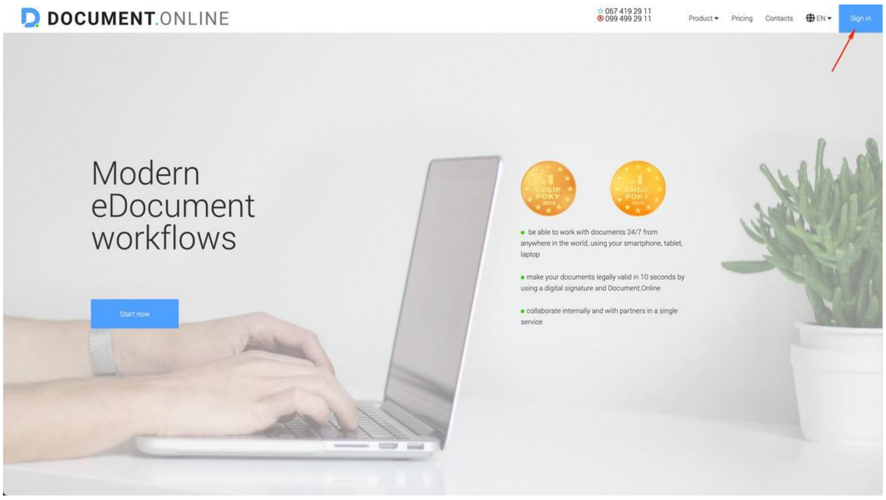
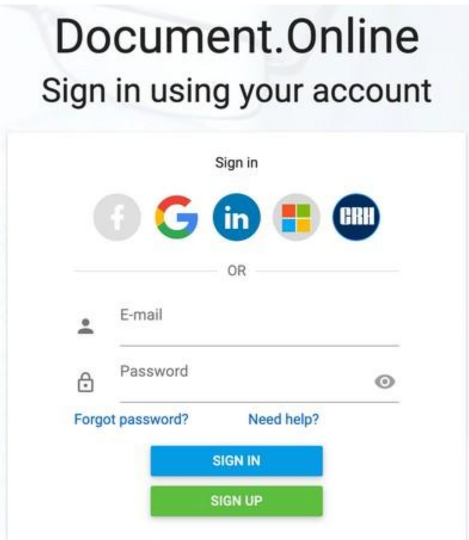
Registration/Authorization on the "Document.Online" portal

To get started with the Document.Online portal, go through the registration process to create a user account. To do this, on the main page of the service https://document.online/ click "Login".



Registration

You can create an account:
1. via one of the social networks (short registration);
2. using mobile ID;
3. by clicking on the "Register" button.



After clicking the "Register" button, enter all the necessary data in the registration form and click "Register".

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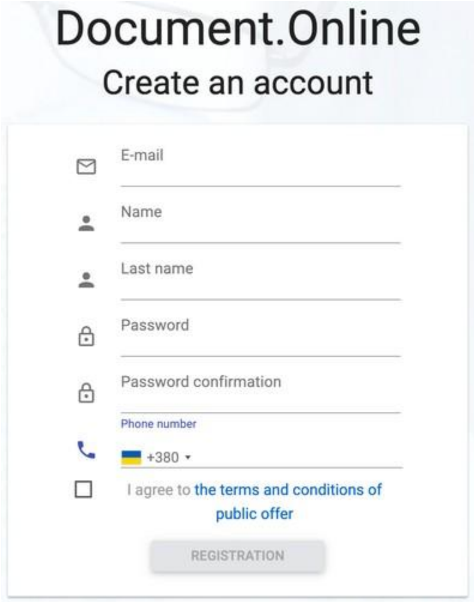
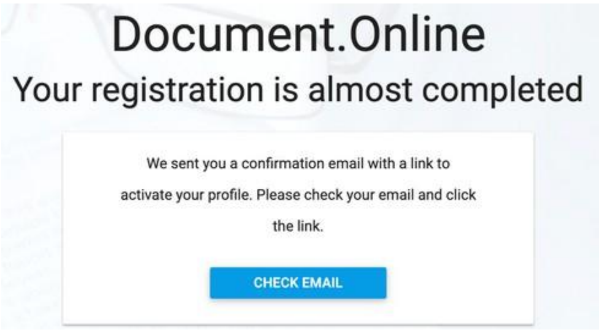
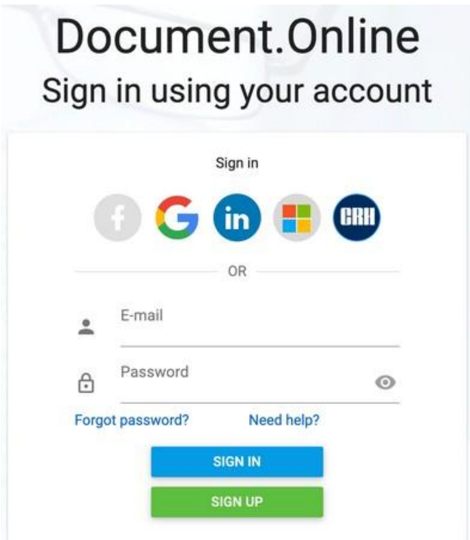


An e-mail will be sent to the specified mail, where you need to confirm the registration by clicking on the link in the letter from the service "Document.Online".



Authorization / Login

If you already have an account in the system, log in with a login and password (or use the login via social network).



Password recovery If you have forgotten your account password, click on the "Forgot your password?" Button. In the modal window that appears, specify the e-mail with which you logged in to the service, and click "Confirm". An e-mail will be sent to the specified e-mail with a link to change the password.

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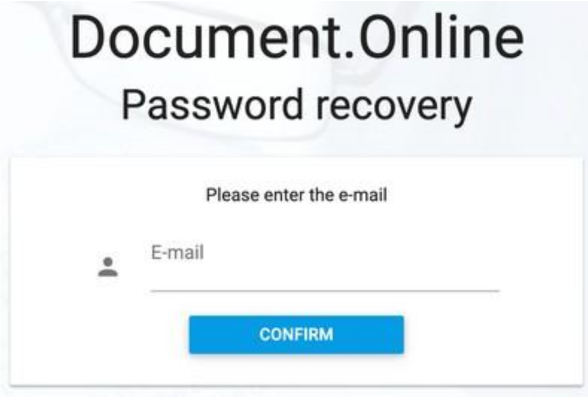
Password recovery

If you have forgotten your account password, click on the *"Forgot password?"* Button.

In the modal window that appears, specify the e-mail with which you logged in to the service, and click
"Confirm". An e-mail will be sent to the specified e-mail with a link to change the password.



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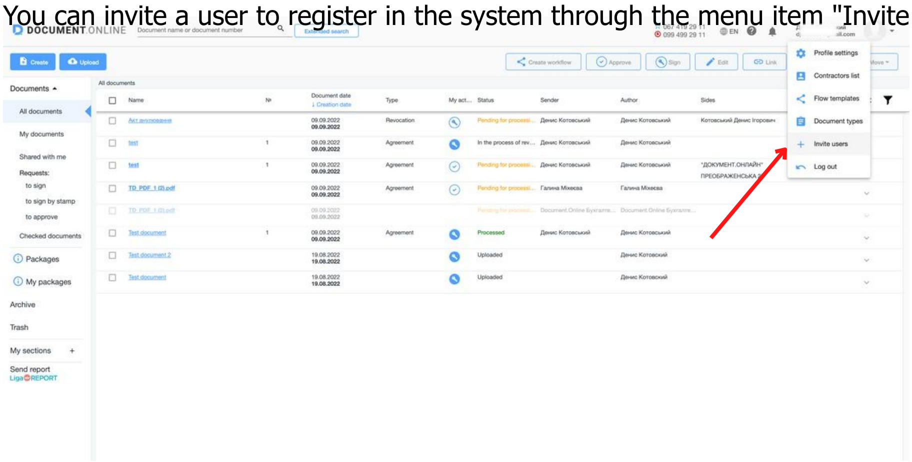
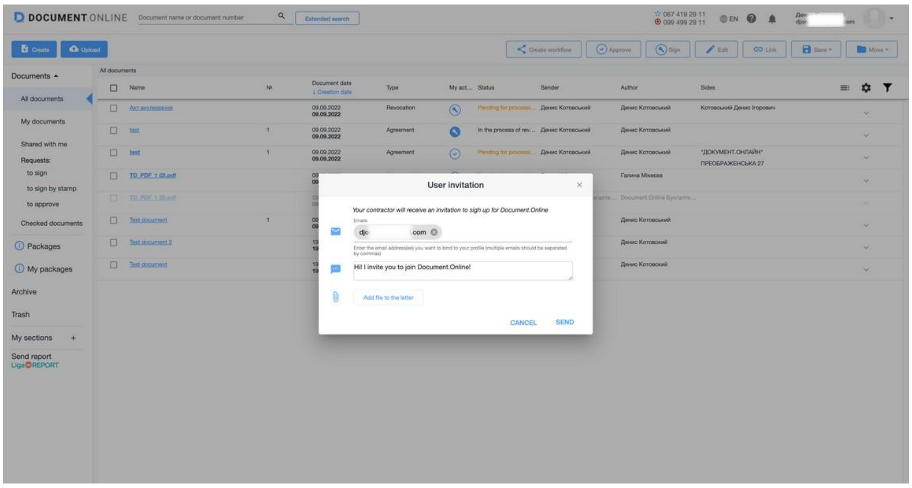
How to invite an employee or contractor to the system?

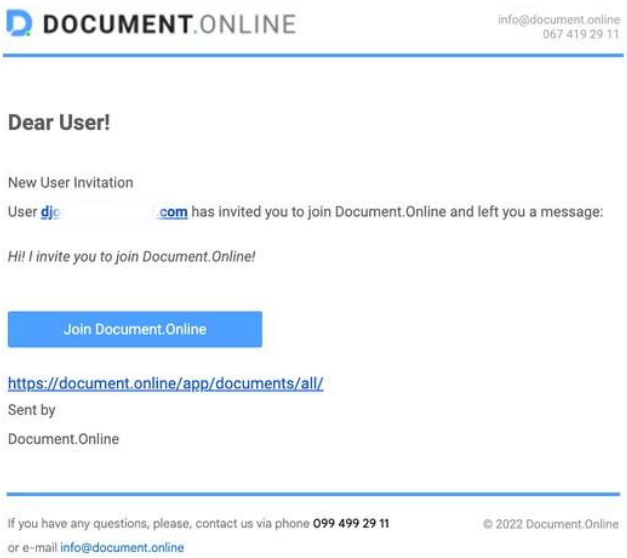
You can invite a user to register in the system through the menu item "Invite user" in the account.



In the modal window that opens, enter the user's e-mail (one, or through someone - several), write a short cover letter and click "Send":



The invited user will receive a corresponding letter to the specified email:


DOCUMENT.ONLINE

info@document.online
067 419 29 11

Dear User!

New User Invitation

User djc .com has invited you to join Document.Online and left you a message:

Hi! I invite you to join Document.Online!

Join Document.Online

https://document.online/app/documents/all/

Sent by

Document.Online

If you have any questions, please, contact us via phone **099 499 29 11**
or e-mail info@document.online

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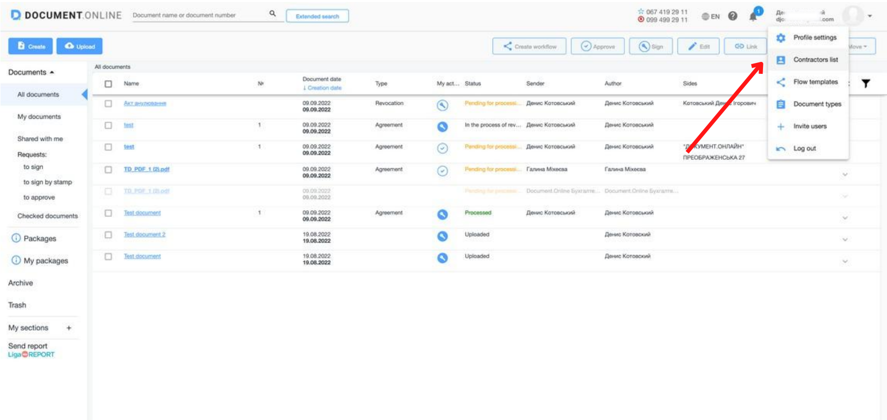
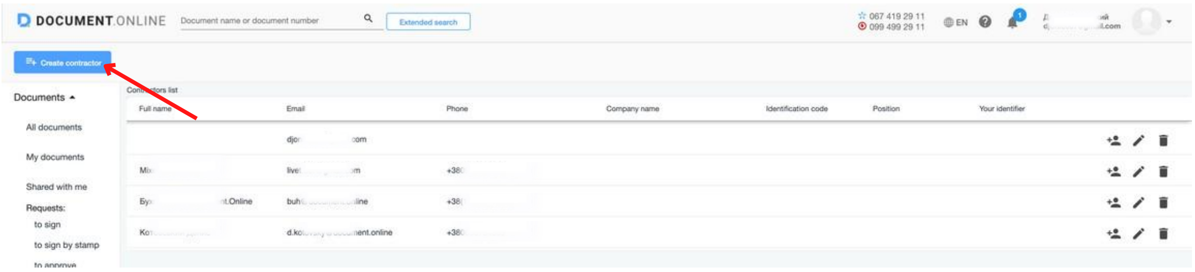
How to configure the contractors list?

For convenient and fast work with the system, you can create a directory of your contractors.

To do this, select "Counterparty Directory" in the account settings menu.

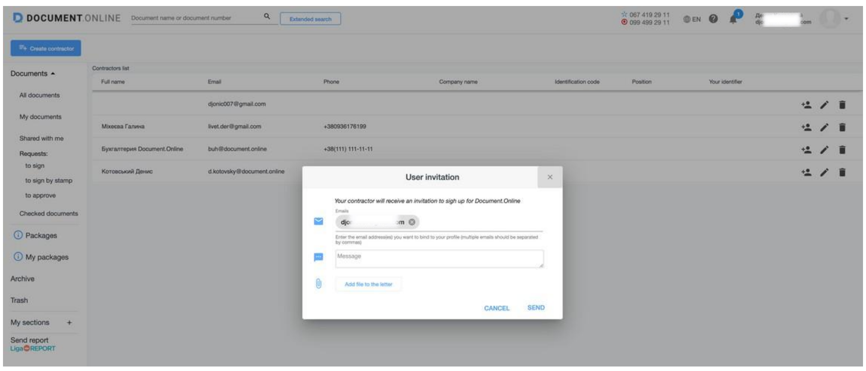


Click the "Create contractor" button to create a new card.



Fill in the data on the contractor card. Click "Save".

If this contractor is not registered in the "Document.Online" system - invite him to become a user. To do this, click on the icon:



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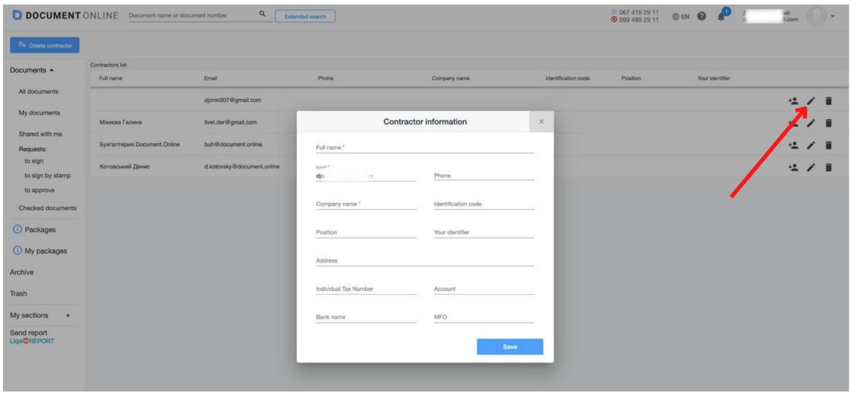
Add the accompanying text to the invitation and click the "Submit" button. You can edit or delete the created counterparty card at any time.



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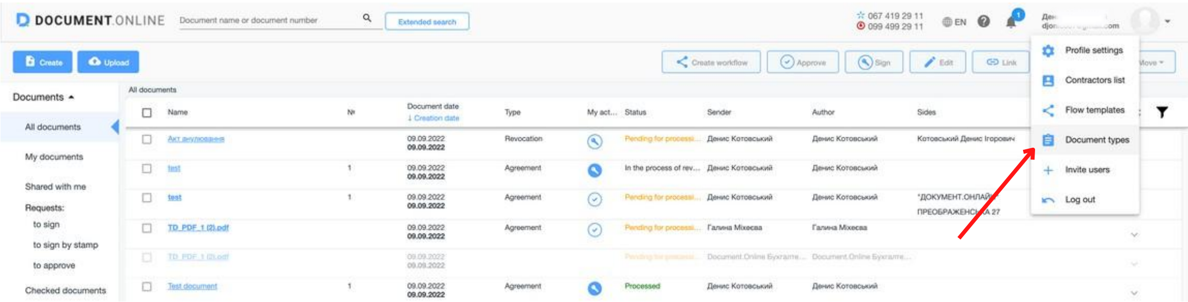
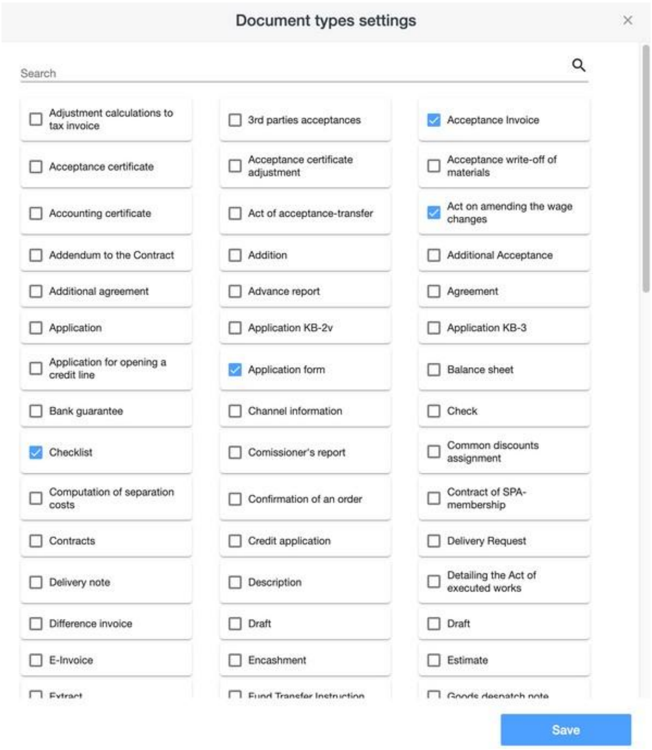
Setting the list of document types

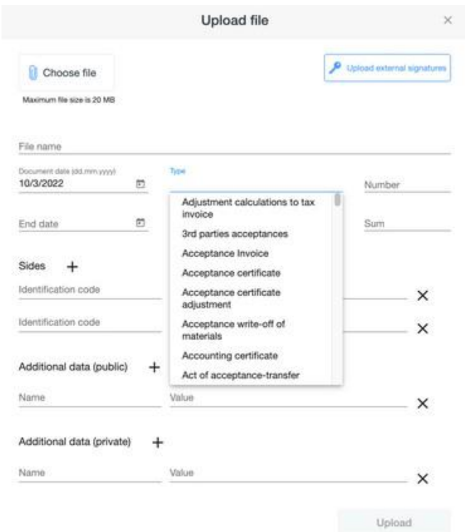
You can set up a list of frequently used documents via the "Document types" menu item in your account. Click on the user icon to open the menu.



In the window that opens, select the types of documents you need by checking each of them, and click "Save":



In the window that opens, select the types of documents you need by checking each of them, and click "Save":



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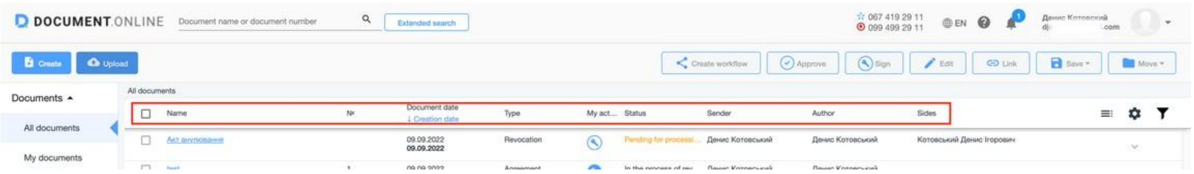
Workspace column settings

Display documents in the "Document.Online" system

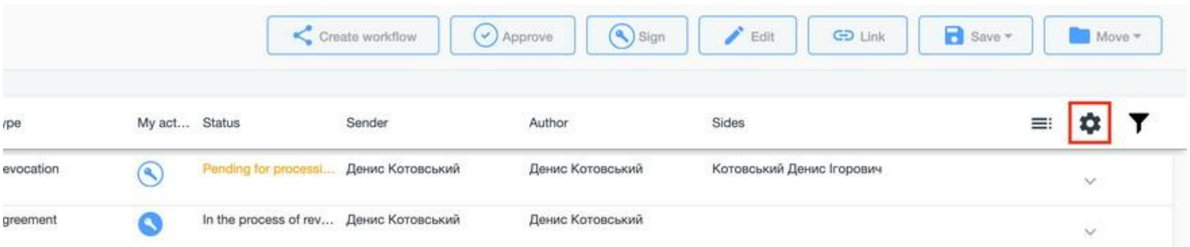
Documents available in your account are listed.



Available fields in the list of documents:

1. **Name** - the name of the document. Specified by the author of the document when loading it into the system.
2. **№** - document number. Specified by the author of the document when loading it into the system.
3. **Document date** - the date on which the document was issued. Specified by the author of the document when loading it into the system.
4. **Creation date** - the date of creation of the route of approval to the document in the system.
5. **Type** - the type of document. Indicated by the author of the document when loading it into the system, selected from the list of certain types of documents (Act of work performed, contract, invoice, etc.)
6. **My actions** - are the action you expect or have taken on the document. Filled by the system automatically.
7. **Status** - the status of the document in the system within your account. Filled by the system automatically. **Sender** - is the name of the user who sent you the document. To be filled in for incoming documents.
8. **Author** - is the name of the user who uploaded the document. Filled in automatically by the system.
9. **Sides** - persons who are listed in the document as parties. Indicated by the author of the document when uploading it to the system.

To adjust the number and width of the columns displayed in the list, click the Settings icon.



The "**Column Options"** window allows you to display the number of columns you need from existing ones and add new columns.

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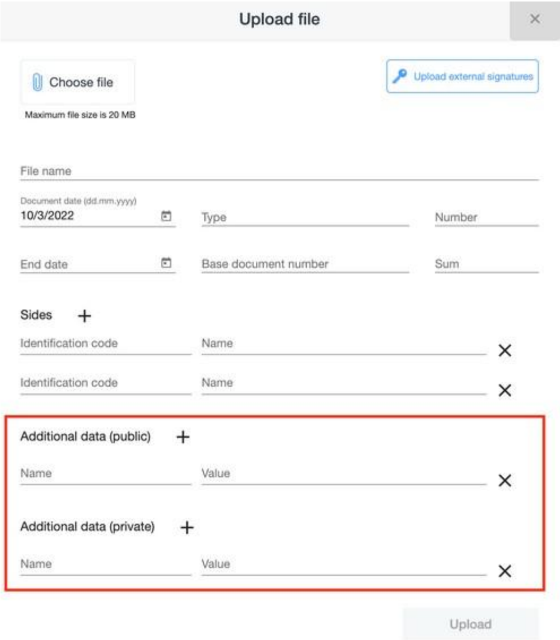
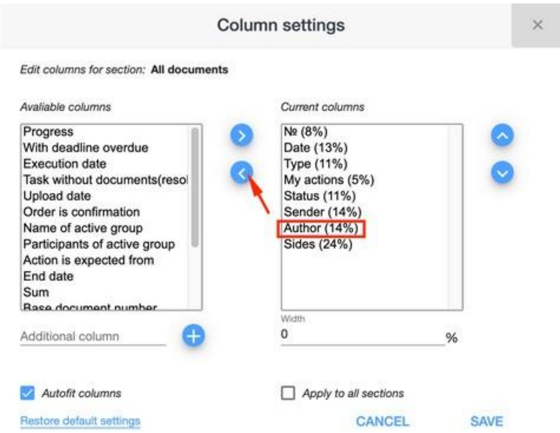
The additional columns created by you will display the data you entered in the fields "**Additional data**" (public) and "**Additional data**" (private) when uploading documents to the system:

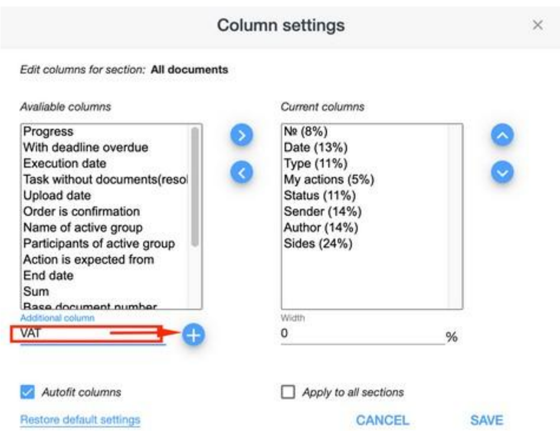


To not display a column, select the desired column and press the "Left" button to remove it from the list of current columns.



The column will go to the "Available columns" section, where you can return it at any time.

It is also possible to create and add a new column to display additional data on documents. To do this, enter the name of the additional data in the "Additional column" field and click on the "+" icon.



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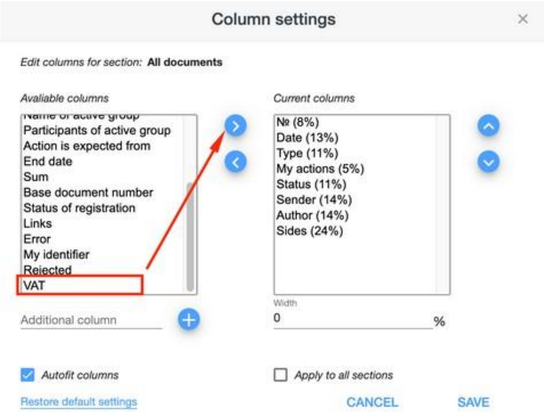
The new column will be added to the "Available columns" list, from where it can be moved to the "Current columns" section by selecting and clicking on the "right" button.



Select a column from the list of current columns and use the up and down arrows on the right to set the desired order of the columns.

The Auto Column Alignment item lists the current columns full screen in proportion to the values specified for the columns. If you want to adjust the width of the columns for display - uncheck the auto-alignment.

Use the Restore Defaults button to restore the default number and order of table columns.

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Sections of documents

All documents in your account are divided into the following sections:

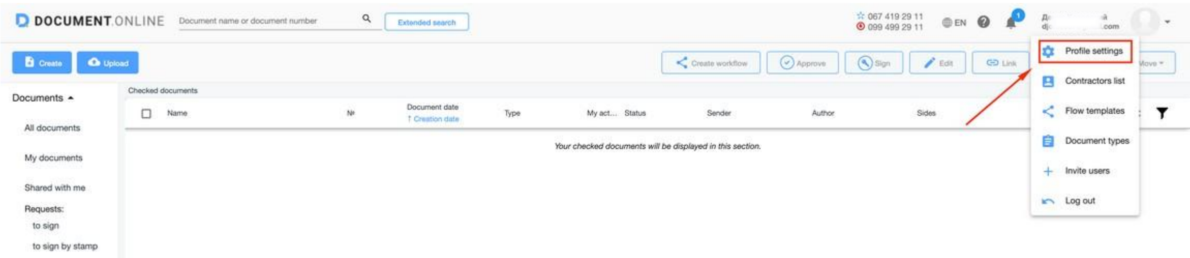
Section name	Description of documents
All documents	All documents created by you or available to you
My Documents	Documents created by you
Shared with me	Documents sent to you by other users
To sign	Documents sent to you for signing
To sign by stamp	Documents sent to you for signing by stamp
To approve	Documents sent to you for approval
Checked documents	Documents that you have marked with checkboxes for mass actions with them
Archive	The section where you can save processed documents
Trash	A section where you can save documents that are not relevant to you
Packages	The section that displays the packages I have access to, including the account packages associated with my account
My packages	The section that displays the packages that belong to the account under which the user logged in
Tasks	A section that will display tasks that require certain actions on your part
My sections +	Here are the sections you created

Important: Documents transferred to the Archive or Trash are not displayed in the "All Documents" section.

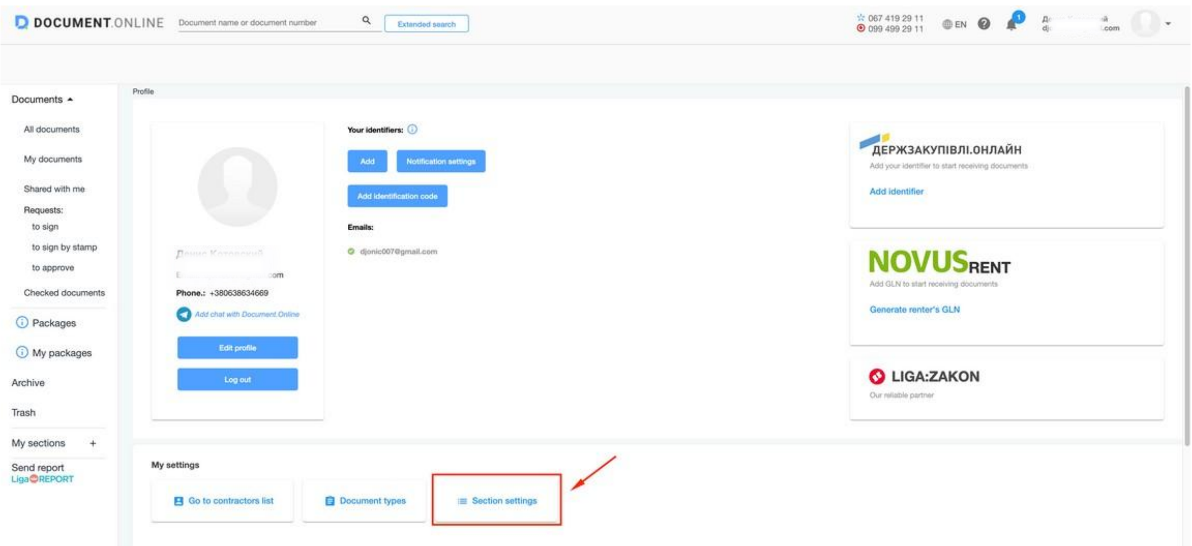
Setting the initial section to display

If you most often work with a certain section of documents (for example, "Packages"), you can configure the system so that after logging in to your account automatically opens this section. By default, the "All documents" section opens.

To do this, go to Profile Settings.



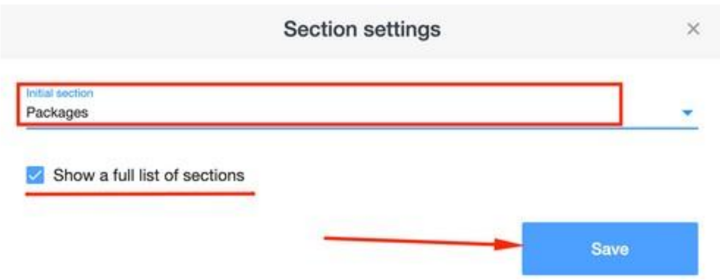
In the "My Settings" section, select "Section Settings".



In this window, select the section that will open automatically after entering the office.

Also in these settings, you can collapse the list of main sections, if you mainly work with "My sections", ie created by you personally. To do this, clear the "Show section list in expanded form" checkbox.

Click "Save".



The next time you enter to your account, the "Packages" section will automatically open.

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Tariffs and payment

Tariff connection and payment for services

To pay for a package of services, follow these steps:

1. Go to User Profile Settings.
2. Go to the Subscriptions section and click Pay.

3. You can choose the appropriate tariff and pay in a way convenient for you (pay by card or issue an invoice).

You also have the opportunity to choose an individual package if no tariff suits you. To do this, leave a request at https://document.online/, indicating your name, e-mail, and phone number on the portal, and our manager will contact you.

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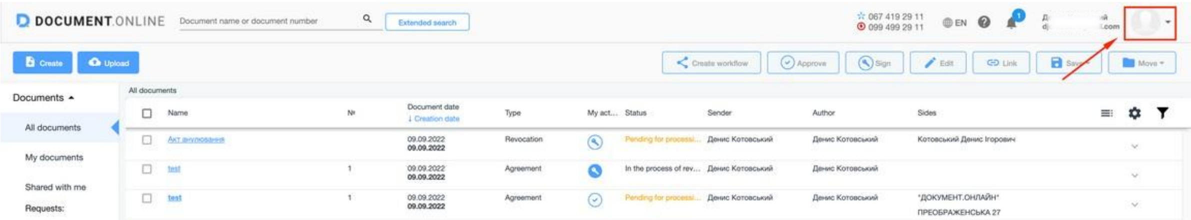
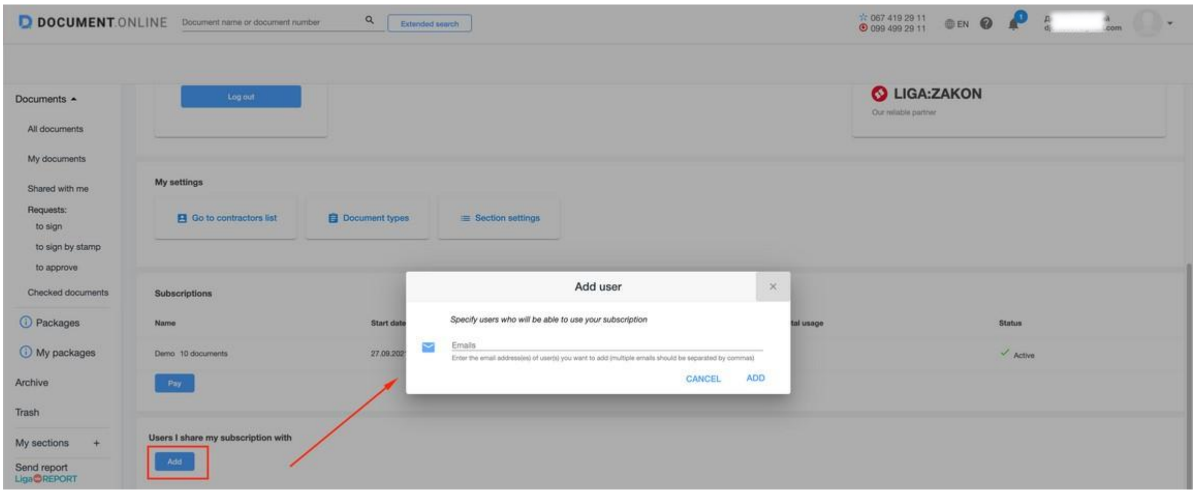
How to connect an employee to your tariff?

To share the same subscription with your employees or contractors, follow these steps:

1. Go to User Profile Settings



2. In the "Users who use my subscription" section, click the "Add" button and enter the email addresses of the users with whom you want to share a subscription:



The user to whom you have granted the right to use your subscription will receive an email.

If you want to unsubscribe from a user, just click the "×" next to the appropriate user:

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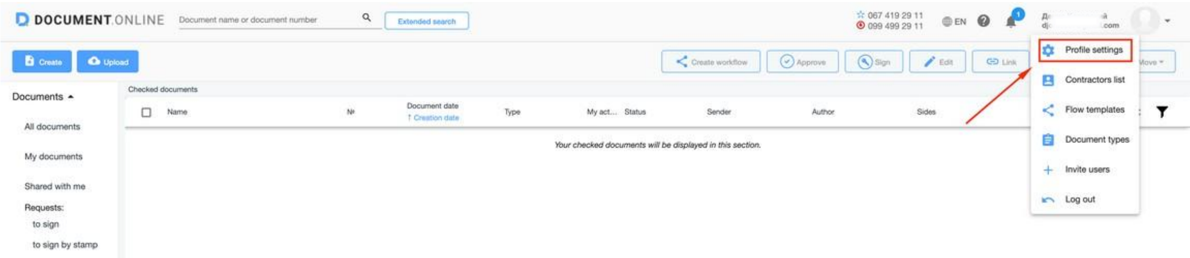
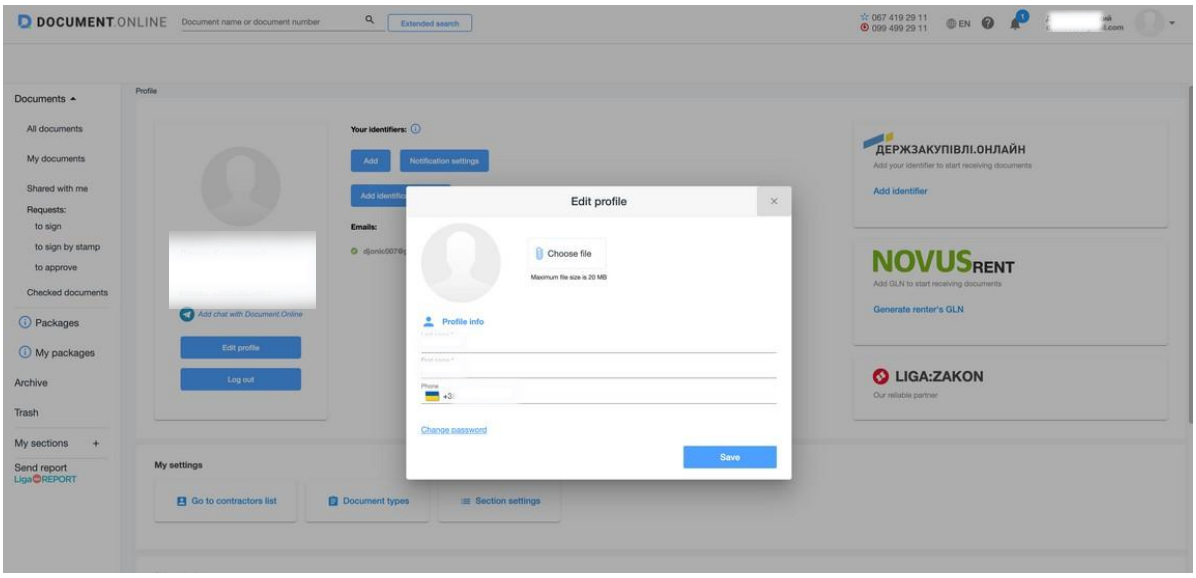
Editing your profile

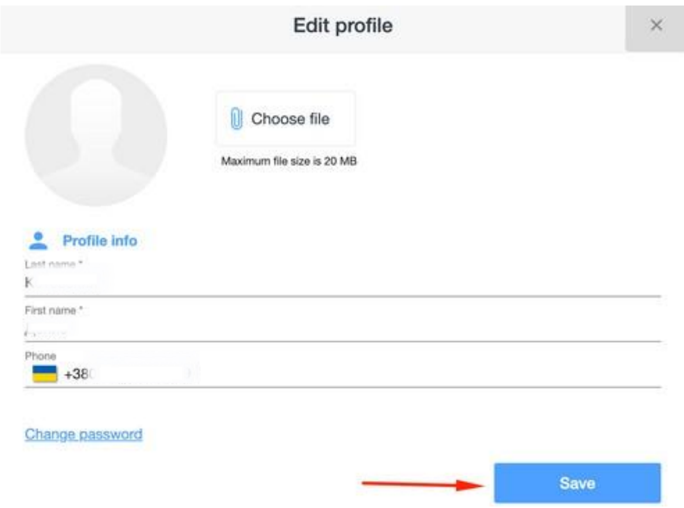
In the upper right corner, click on the profile image and then on "Profile Settings".



Then click the "Edit Profile" button and change the required information: last name, first name or phone number.



Click "Save". Changes will be saved.



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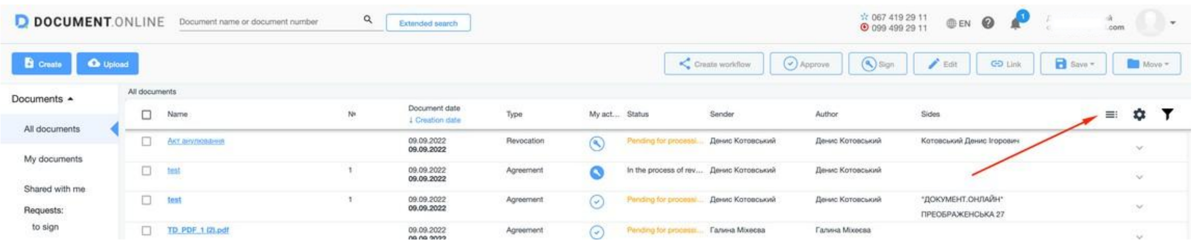
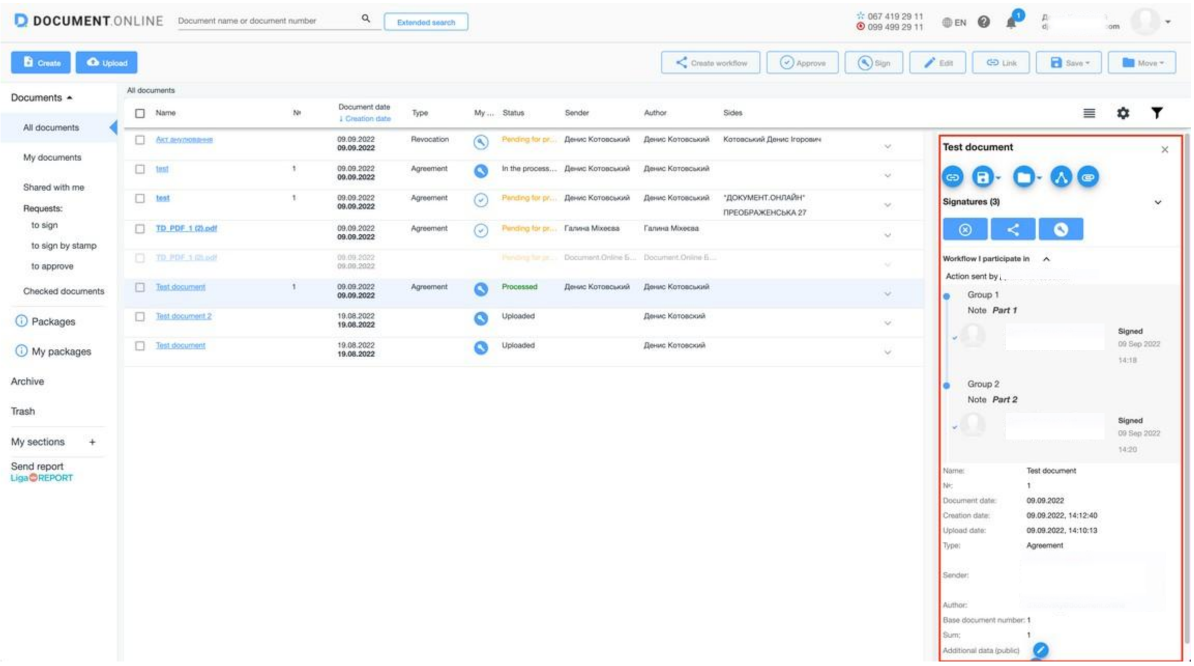
Using the dashboard

Details of the document can be viewed in the list of documents, without opening the document itself - using the Dashboard. That is, the Dashboard is nothing more than a quick view of the data on the document.

To use this feature, go to the desired section and click on the "Dashboard" icon located in the header of the list of documents.

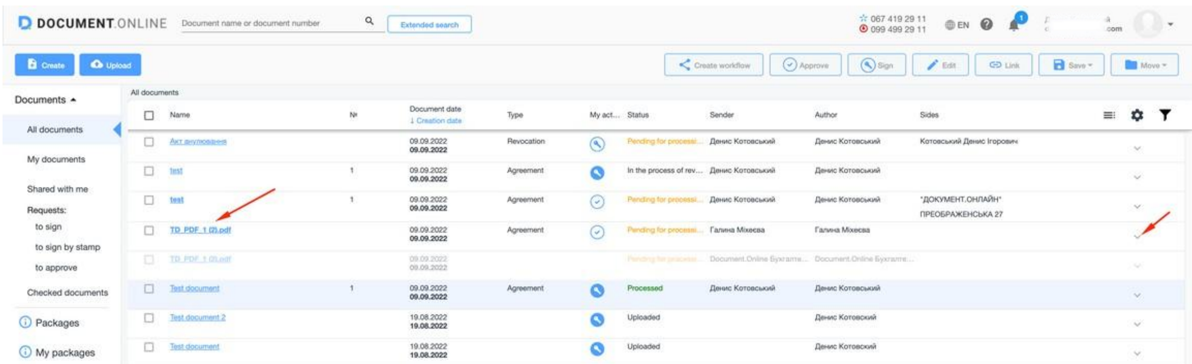


By clicking on the documents, you can view information about them and perform quick actions. All buttons are active.



To return to the regular list, click the Dashboard icon again.

To open the required document for viewing when using the Dashboard, simply click on the name of the desired document or use the document opening window.



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Statuses of documents in the system

In the process of working with documents, their status in the system changes depending on the action.

Document status	Description
Uploaded	Assigned when downloading a document.
Approval request from recipient	Assigned to the document that was sent by you for the approval of your counterparty.
Signature request from recipient	It is assigned to the document that was sent by you for signing to your counterparty.
Completed	Assigned to the document when the assigned route of the Agreement has been passed by all participants.
Rejected by recipient	It is assigned if the participant of the Agreement has rejected the document.
Pending for processing	Assigned to the document if it was sent to you to perform a certain action (signing / approval).
Processed	Assigned to the document when you have performed the assigned action (signed / agreed or rejected).
Overdue	Assigned to the document if the participant has not performed the assigned actions with the document by the set time. Any actions with such a document are prohibited.
In the process of revocation	Assigned to the document if the participant has withdrawn the document
Restricted access	The sender or author has taken away your right to access the document. The ability to perform actions on the document is suspended.
Revoked	The document was annulled, formed "Act of Cancellation" was signed by all parties who previously signed the document.

My actions

The "My actions" field indicates the action you have already taken or need to take.

- Pending signature
- Pending approval
- Signed
- Approved
- Rejected
- Reviewed

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Example:

You uploaded the document to the system, signed it with the QES and sent it to the contractor for signing by him.

You will see this document in the "My Documents" section;
The status of the document will be "Signature request from recipient";

Signed icon will appear in the My Actions field.

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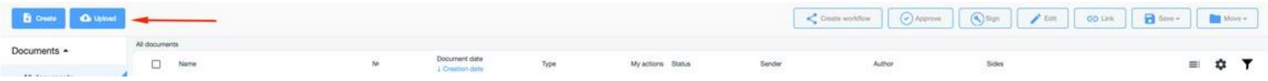
Uploading documents

To upload the document to the portal, click the "Upload" button:



In the modal window that opens, select the desired file from your computer.
The maximum file size that can be uploaded is 20

MB. Fill in the information about the document.

Fields to fill:

Document name	Enter the title of the document. If no name is specified, the document will be given the name of the downloaded file.
Date	Select the date the document was created from the drop-down calendar or enter it manually in the format "DD.MM.YYYY".
Type	Choose the type of document from the available list (certificate of work performed, contract, etc.).
Number	Assign a number to the document.
End date	Select the end date of the document from the drop-down calendar or enter it manually in the format "DD.MM.YYYY". The "end date" can be used for documents such as contracts. If necessary, you can specify this attribute for any document. You will receive an email reminder 30 days before the deadline.
Reason document number	Indicate the number of the ground document.
Sum	Specify the amount specified in the document.
Parties	Add a list of parties listed in the document. To do this, just start entering the USREOU code or company name. The system refers to the open state registers and selects the options of the relevant legal entities to choose from. If for some reason the desired company could not be found - enter the details of the company yourself.
Additional data (public) / (private)	Add additional parameters to the document filter later. Specify the name of the parameter and its value. "Public data" will be visible to all participants to whom the document was sent, and "Private data" will be visible only to you. You can also use "Additional Data" later to display a list of workspace documents in Current Columns (see Configuring Workspace Columns).

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After filling in the required fields, click the "Upload" button.

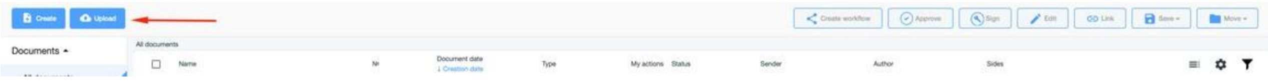
Important! It is worth noting that these fields are optional, but the entered attributes greatly simplify the processing of documents on the portal, in particular in the context of their search and sorting. This is especially true when working with a large number of documents.

Once uploaded, the document will appear in the list of documents in the "My Documents" and "All Documents".

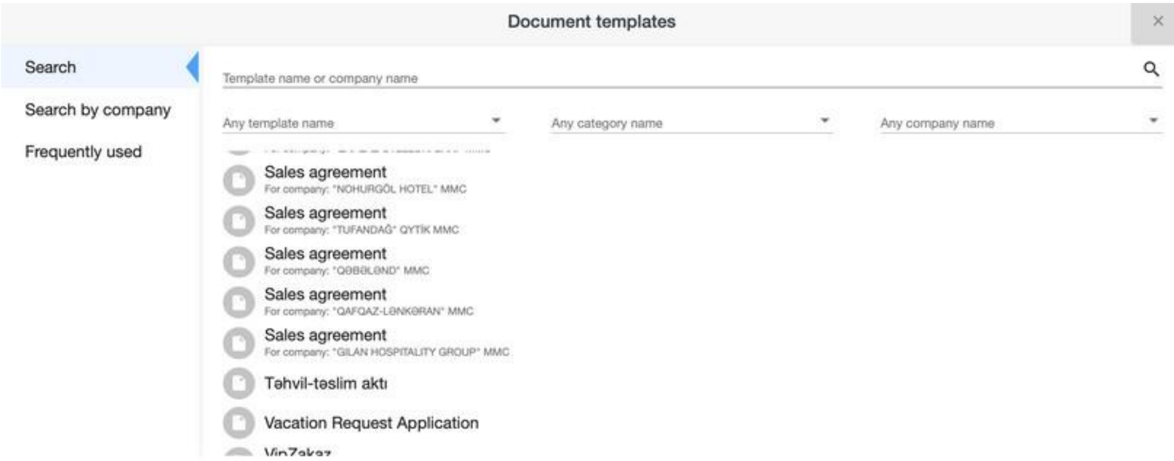
Creation of documents according to system templates

You have the opportunity to create documents from the system templates offered on the portal.

Click the "Create" button to create the document.



A window for selecting a template for creating a document will open:



Click on the name of the template. Fill in all required fields. Click the "Save" button.

The created document will appear in the "My Documents" and "All Documents" sections.

WARNING! The list of available templates will be constantly updated on the "Document.Online" portal, stay tuned for system updates.

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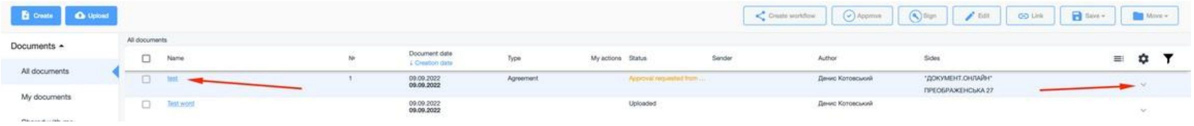
Signing documents

To sign the document, open the required document.

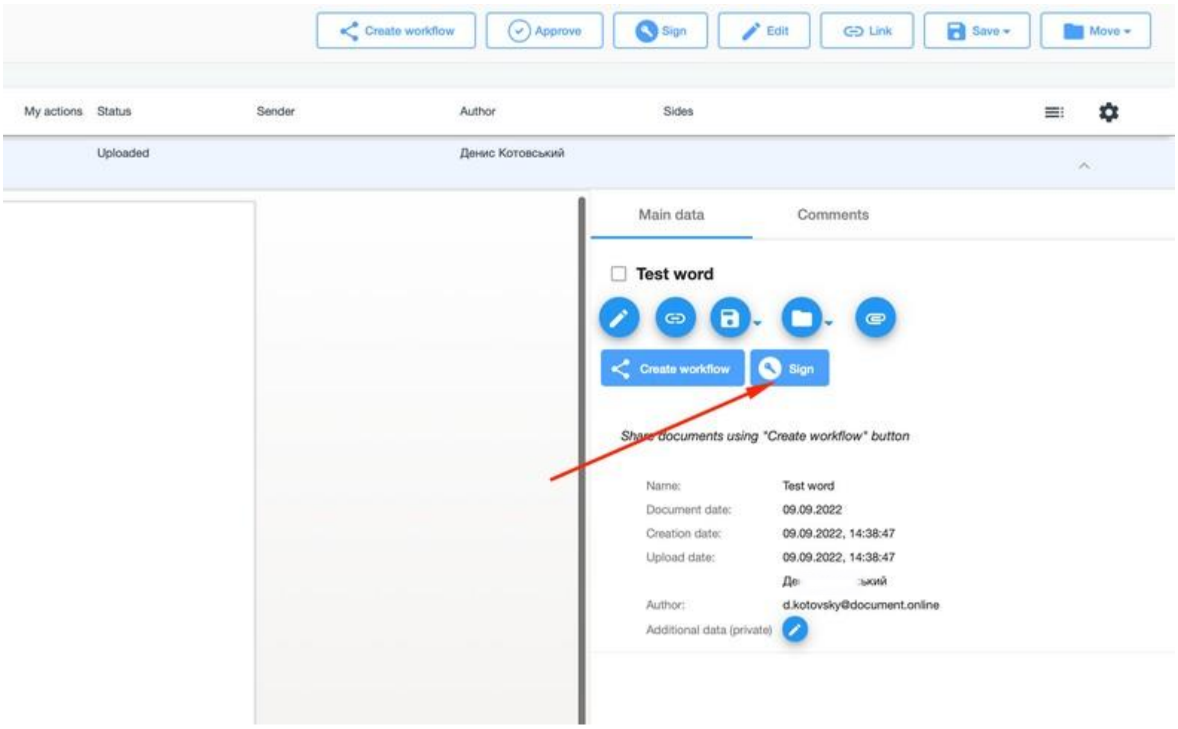
To do this, click on the document name in the work area or use the document opening window:



After opening the document, you can view it.

Important! If the document has a wet stamp or a handwritten signature, such a document cannot be signed electronically. Documents uploaded to the CEP Overlay Portal do not need to be physically certified beforehand.

To sign the document on your part, click the "Sign" button on the toolbar.



In the modal window that opens, select how to sign the document.

For example, the way you choose to sign is with file media. To do this, click "Select" and select the folder with the required file key on your computer.

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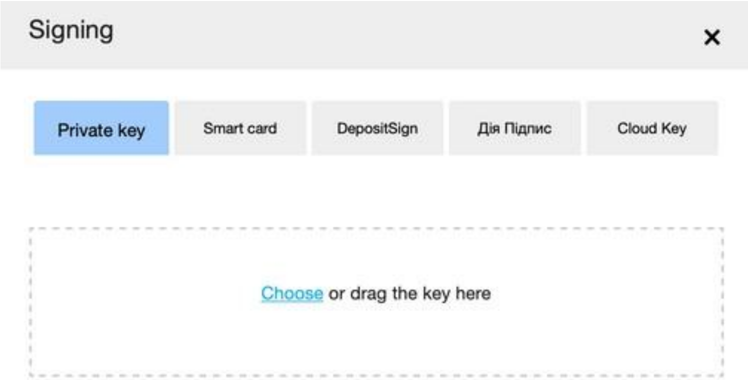
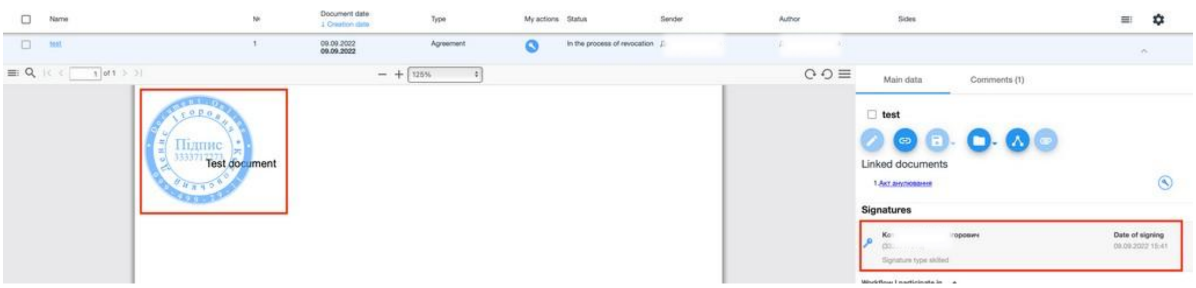


Pull up the key, enter the password and click "Add key". Then click "Sign".

The signed document will open for viewing. The signature itself will be indicated on the right sidebar, and a signature icon will appear in the My Actions column.

Important! *The display of the QES seal on the signed document is available only for PDF documents. This print image has no legal force, it is made for visualization.*



The next time you sign documents, your file carrier will automatically appear in the Signature window. To sign, just click the "Sign" button. You can also add multiple file carriers.

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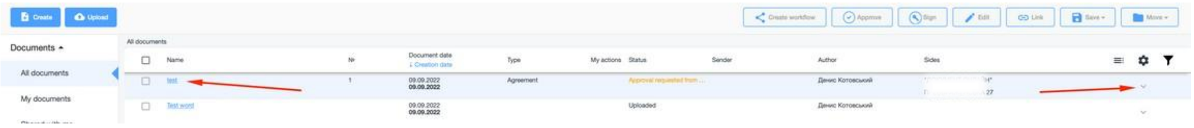
Document workflow settings

Setting the outgoing document workflow

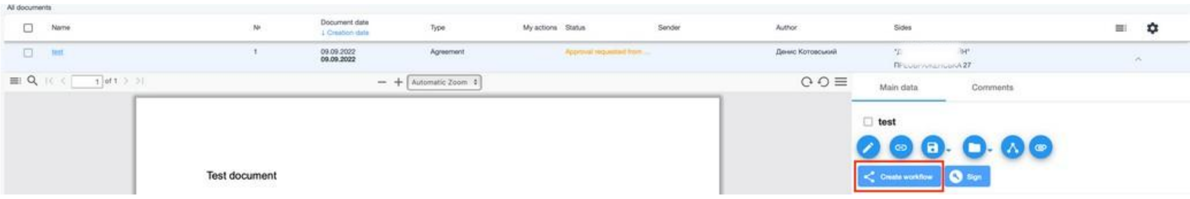
If you need to send a document to several participants or groups of participants who need to perform certain actions on the document sequentially, use the "Workflow settings" function.

In addition, with "Workflow Settings" you can apply separate settings for each of the Recipient Groups, such as the type of action with the document ("Signing", "Agreement", "View"), the end date, and more. To configure access to your document for other users of the system, first, open the required document.

To do this, click on the document name in the work area or use the document opening window:

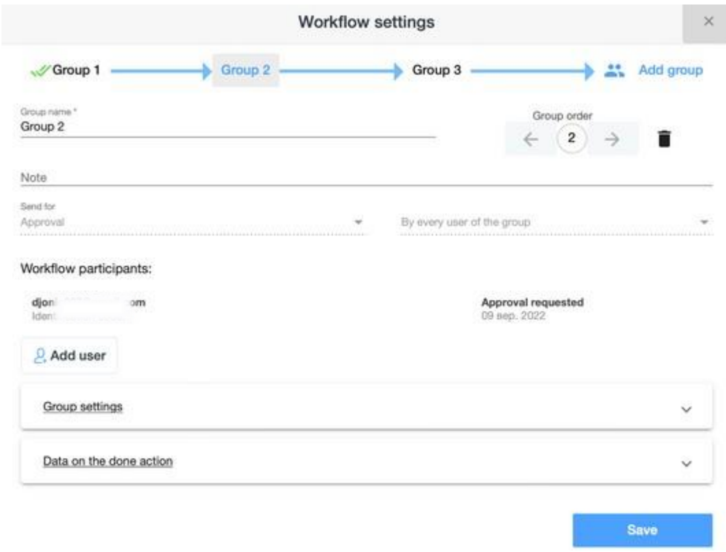


After that, click the Customize Route button on the right sidebar.



Fill in all required fields in the Workflow Settings form that opens:

1. Enter the name of the group;
2. Leave a note (if necessary) that will be seen by all members of the group;
3. Select the target action to be performed by the group - View, Reconcile, Sign the document;
4. Select the event in which the action will be considered performed:
   - "One of the participants" - the assigned actions can be performed by one of the added participants;
   - "All participants" - the assigned actions must be performed by all participants to whom the document will be sent.



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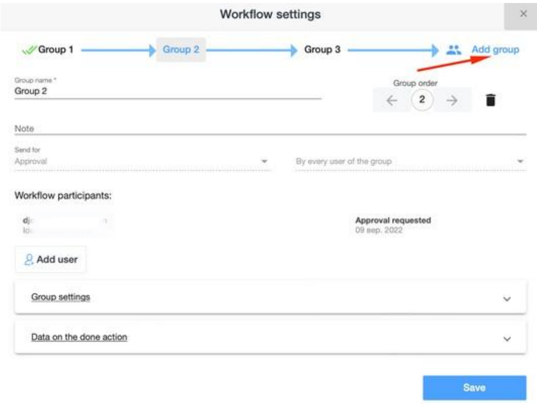
5.If necessary, you can specify the end date of the action on the document for the Group. The end date settings for document processing are described in detail below. To set a deadline, check the box next to "There is an end date for the action" and select the desired date or period. Also select a condition if the specified action is not performed by the scheduled date:

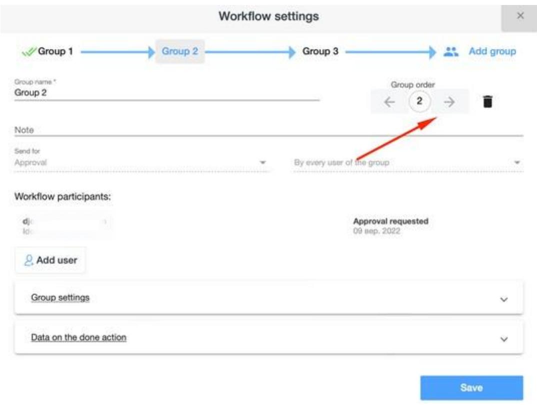
- "Expect the participant to take action" - a conditional deadline, ie the document will be in the Group until the assigned actions are performed.
- "Prohibit action and move to the next group" - hard deadline, ie if the group does not perform the assigned actions by the specified date, it will no longer be able to perform the assigned actions; The "status" of the document for this group will automatically change to "Overdue", and the document will automatically move to the next group.

6.Add a member of the group - specify the email of the desired person and, if necessary, USREOU / TIN (according to the specified value, the system will test the QES for this USREOU / TIN); You can add an unlimited number of members to the group using the "Add member" button.

7.To create a new group, click "Add group" in the route settings window to the document and fill in the fields similar to filling in the information for the previous group.



Regardless of the number of groups in the negotiation route, your document will be sent to the members of the next group only after the members of the previous group have performed the actions assigned to them.



Created groups can be deleted and moved between them. You cannot move the active group, move back the first group in the list, and move the last group in the list forward. You can delete any group (including the active one) except groups that have already completed the target action.

After filling in the required data, click "Save".

Set an end date for document processing

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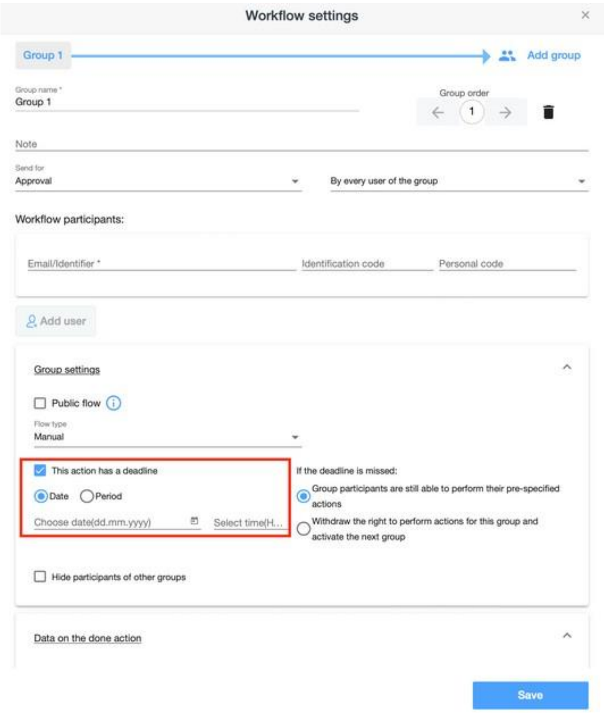
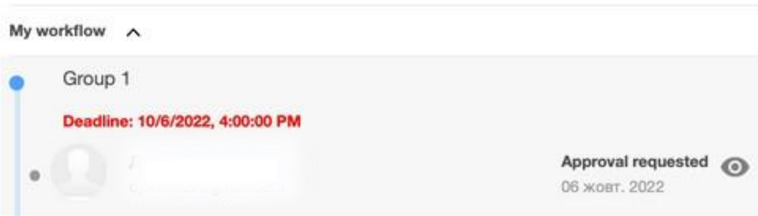
On the "Document.Online" portal, the contractor can send the document for signing or approval, while setting deadlines.

To set an end date for actions on your document to other users of the system, check "End action is the end date" and select the desired date.



This date is displayed when opening the document in the letter of agreement.



If the deadline period is three days, this line is displayed in yellow.

In one day, the line is displayed in red.

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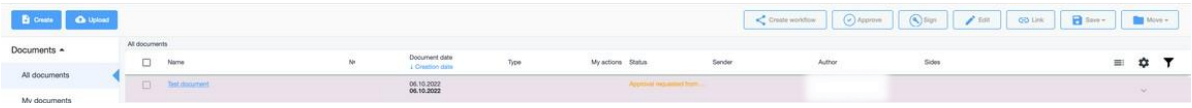
If the action was not performed by your counterparty before the specified period, the letter of agreement shows that this document is overdue.

In the sections where this document is located, the line of the document is displayed in a certain color (yellow or red) according to the specified processing time of the document.



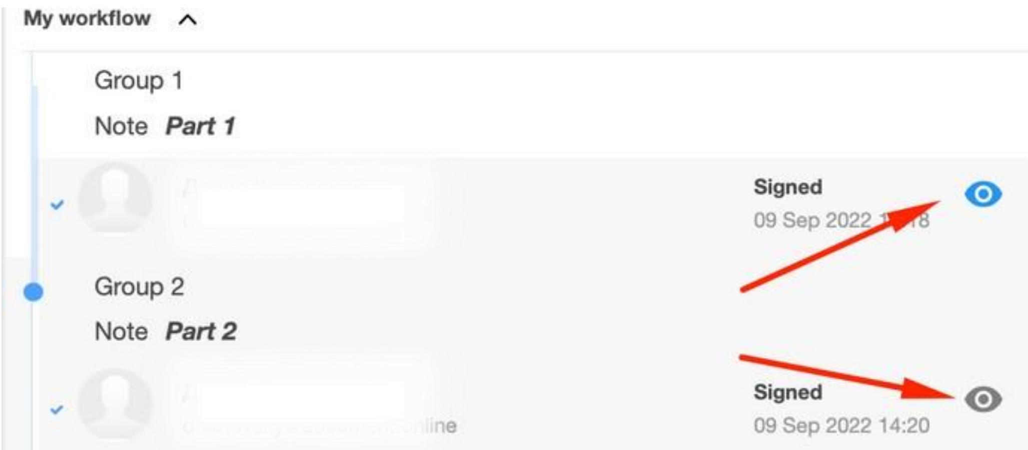
The recipient (group of recipients) of the document who did not perform their action is as follows: three days and one day before the deadline for the action with the document they receive a message in the mail with a reminder that the expiration of the action with the document.

View the full route of the document

The route of the document can be seen on the right sidebar after opening the document. The author of the document will be able to view the full route, and other participants will see only those who are in the route in front of them.
A gray or blue icon will appear in front of each route participant.

Gray icon - The document has not yet been viewed.

Blue icon - The document has been viewed.



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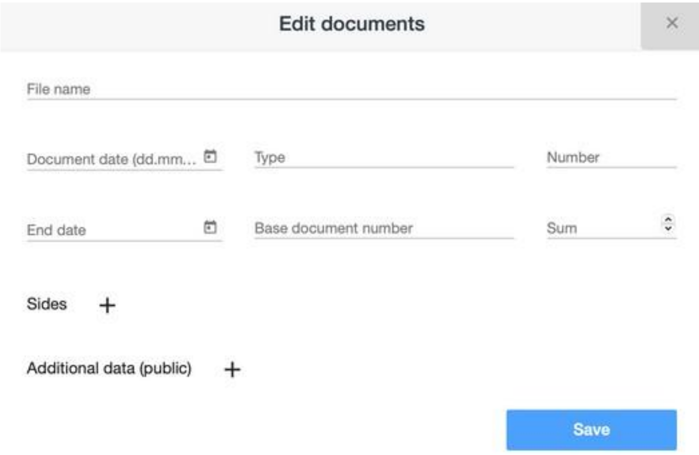
Editing data on documents

For documents created by you, there is a function "Edit document". To do this, click on the appropriate button in the information panel of the document:

This feature allows you to change the information on the document that was entered at the time of its download. After making the necessary changes, click "Save".



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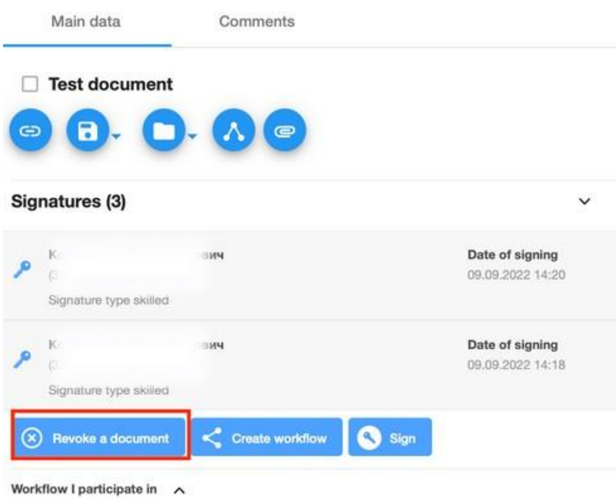
Revoke of documents

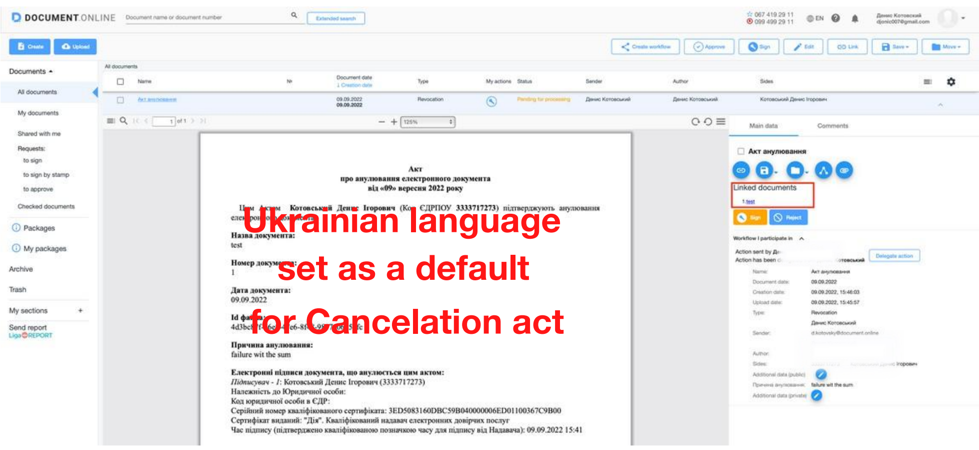
If you signed the document and sent it to the contractor, the contractor also signed this document, but the document is incorrect, you can revoke this document.

To do this, open the document and click the "Revoke a document" button.



A window opens to indicate the reason for revoking the document. Enter a comment and click the "Start Revocation Process" button.

After starting this process, you automatically create a "Cancellation Act" which specifies all the data about the document that is in the process of revocation. The document you are revoking is also automatically attached to this act.



This act of cancellation is sent to you for signing. After signing by you, this document is automatically sent to your contractor.

After signing by the contractor, the document receives the status "Processed".

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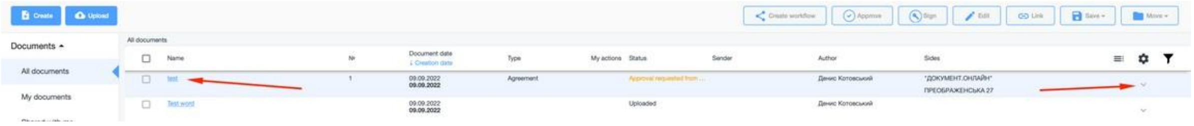
Signing documents

To sign the document, open the required document.

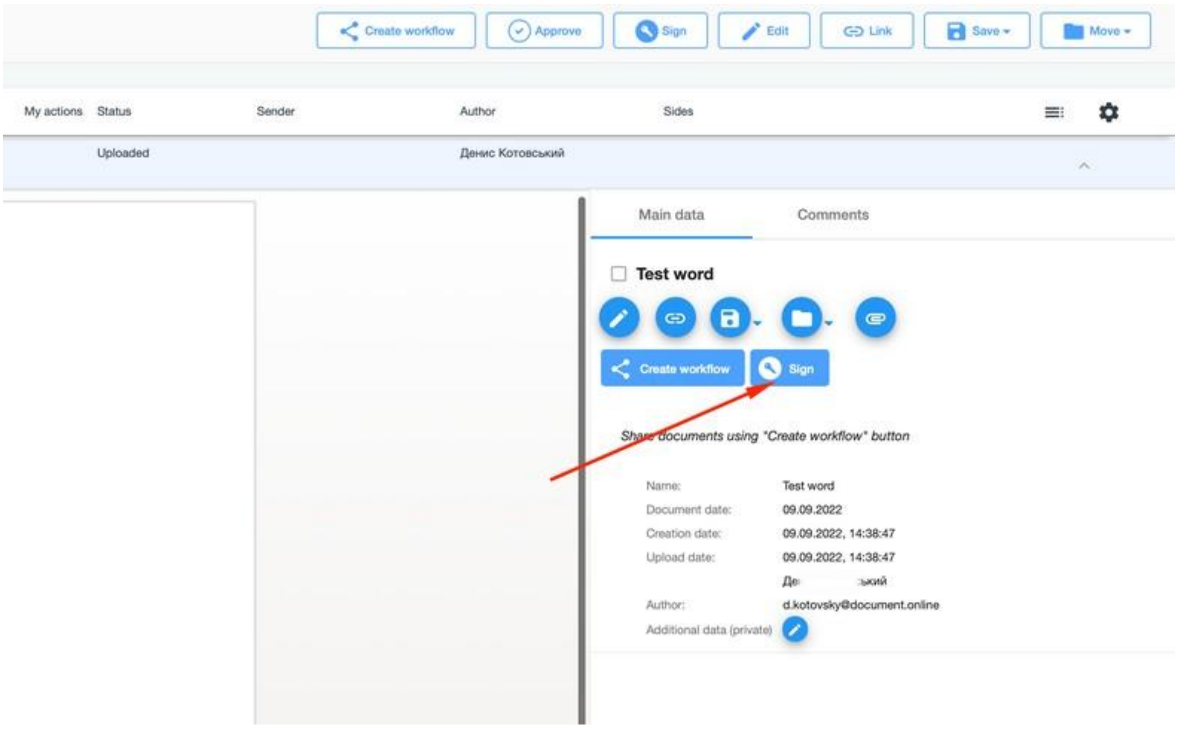
To do this, click on the document name in the work area or use the document opening window:



After opening the document, you can view it.

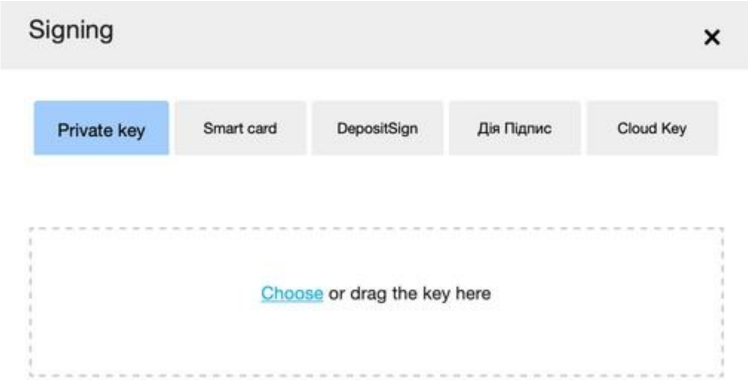
Important! If the document has a wet stamp or a handwritten signature, such a document cannot be signed electronically. Documents uploaded to the CEP Overlay Portal do not need to be physically certified beforehand.

To sign the document on your part, click the "Sign" button on the toolbar.



In the modal window that opens, select how to sign the document.

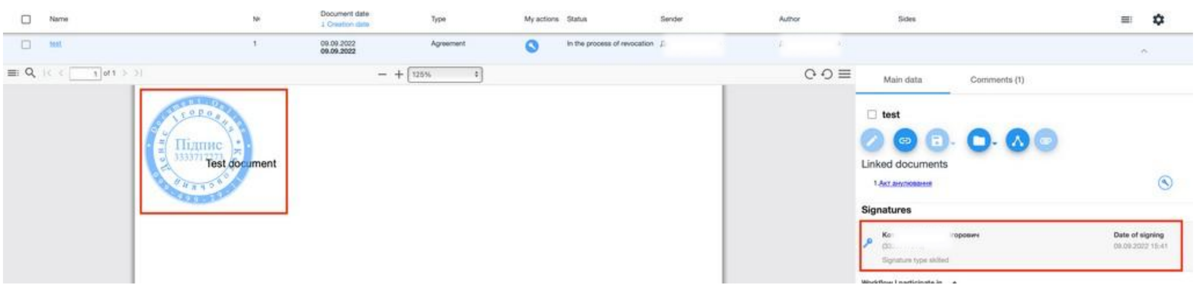
For example, the way you choose to sign is with file media. To do this, click "Select" and select the folder with the required file key on your computer.



Pull up the key, enter the password and click "Add key". Then click "Sign".

The signed document will open for viewing. The signature itself will be indicated on the right sidebar, and a signature icon will appear in the My Actions column.

Important! *The display of the QES seal on the signed document is available only for PDF documents. This print image has no legal force, it is made for visualization.*



The next time you sign documents, your file carrier will automatically appear in the Signature window. To sign, just click the "Sign" button. You can also add multiple file carriers.

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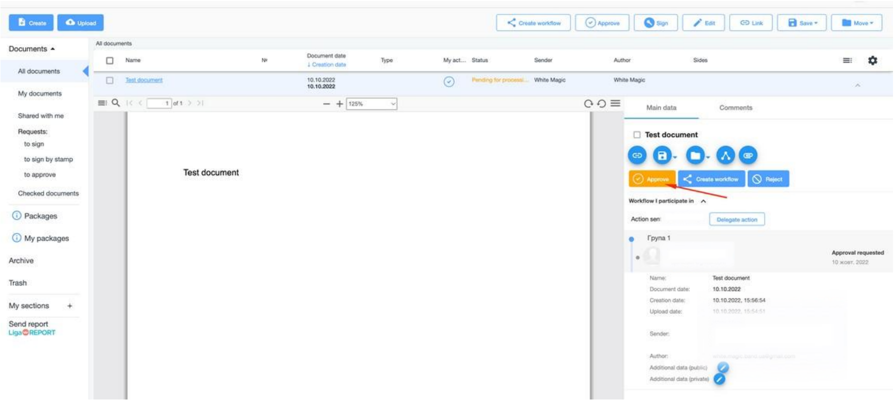
Approval of documents

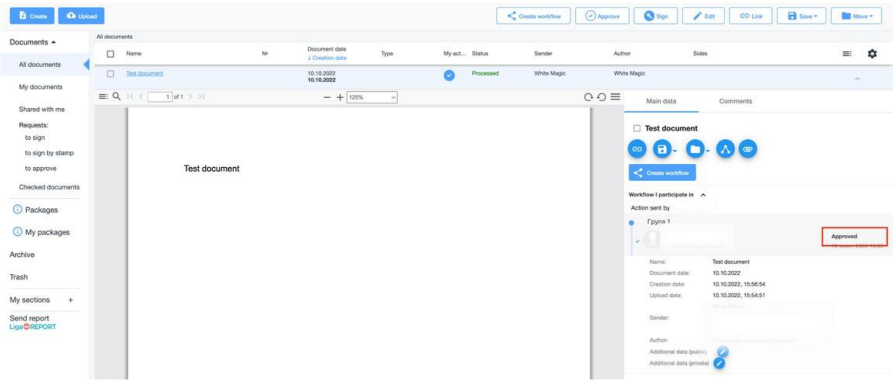
To approve the document, open the required document.

To do this, click on the document name in the work area or use the document opening window:



Once you open the document, you can view it.

To approve the document on your part, click the "Approve" button on the toolbar.



The document will be approved, the "My Actions" icon and the Status of the document will change, and information about the time of document approval will appear in the approval letter.

The user who sent you this document will receive an e-mail notifying you that the document has been approved by you.

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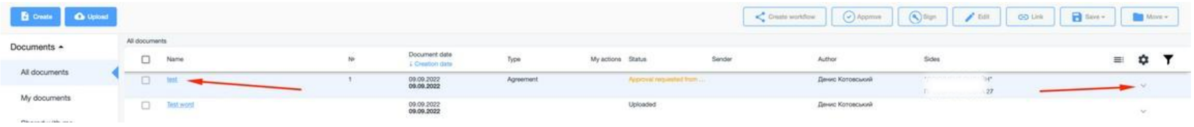
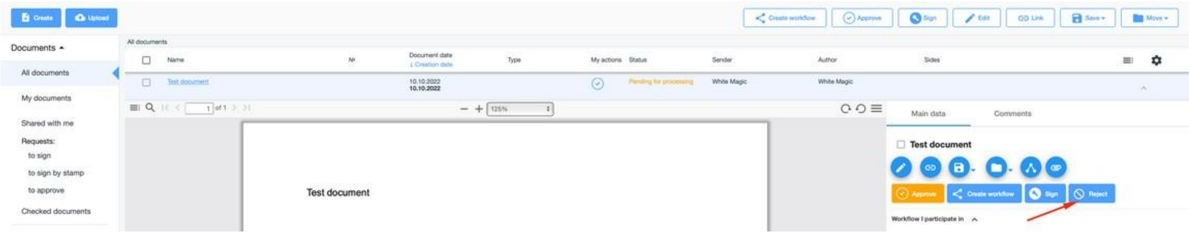
Rejection of documents

If you do not agree with the contents of the document that was sent to you in the system for approval or signing, you can notify the sender by rejecting this document.

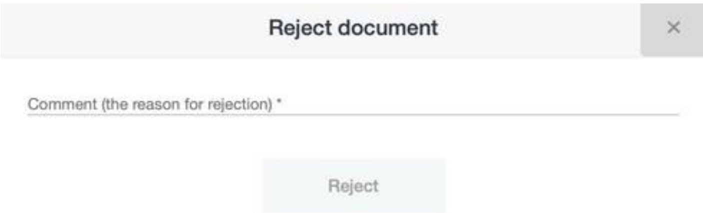
To do this, click on the name of the desired document or use the document opening window.



In the right sidebar, click
Reject.



It is mandatory to indicate the reason for the rejection of the document. Describe the reason and confirm your intention by clicking Reject.



"Rejected" will appear in the system next to the document in the "My Actions"
column.

The user who sent you this document will receive an email notifying you that the document was rejected by you. The status of the document at the author will change to "Rejected by the recipient".

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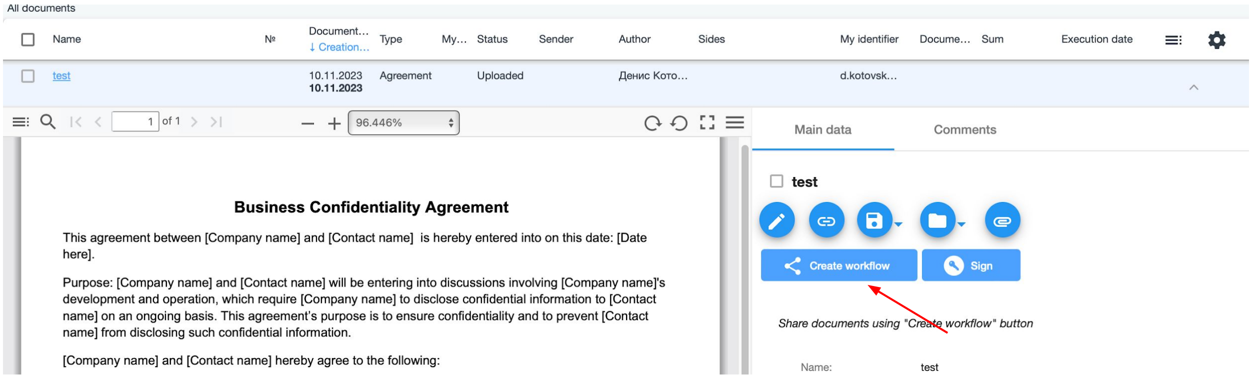
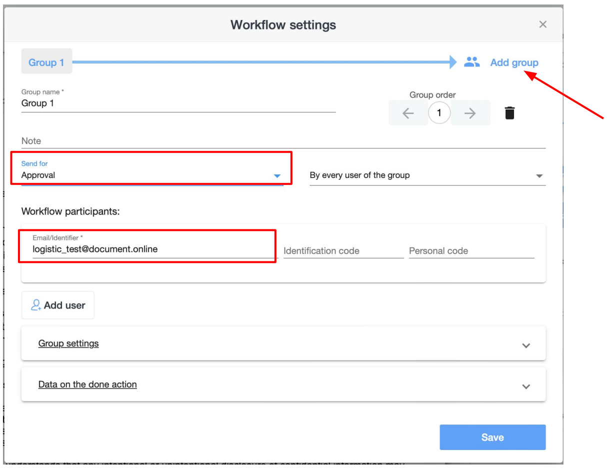
Sending documents for additional approval

Let's consider a situation where additional approval is required before signing an incoming document. It is worth noting that you can personally sign the document or delegate the action to another person. Below, we will examine both situations.

Open the incoming document and click the "Create workflow" button on the right side panel.

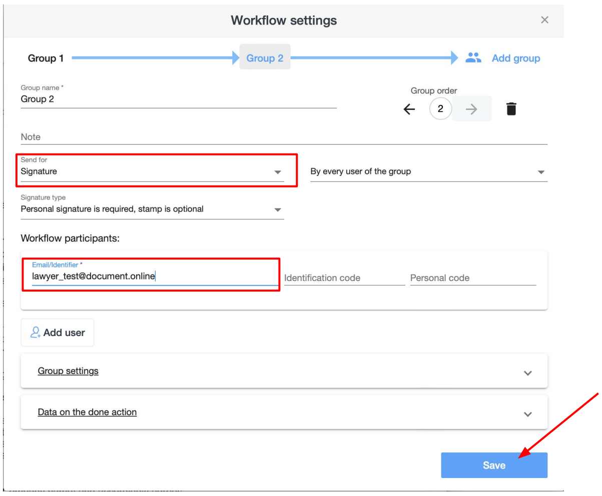


The first group will handle the approval process. Select the target action "Approval" and enter the email of the person who will approve the document in the "Email/Identifier" field. Click "Add Group.»



The second group will handle the signing process.

1. If you will be signing the document, choose the target action "Signing" and enter your email in the "Email/Identifier" field. This way, after approval, the document will be automatically sent to you for signing. Click "Save.»



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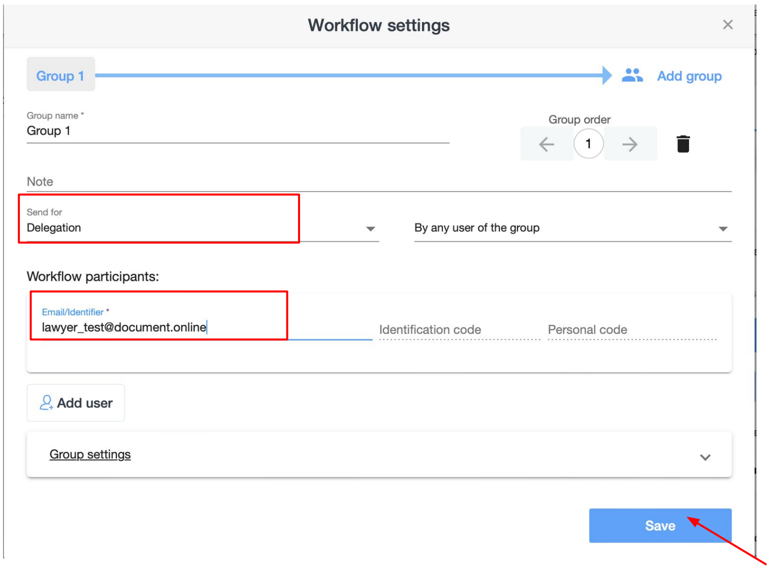
2. If someone else will be signing, choose the target action "Delegate" and enter the email of the person who will sign the document in the "Email/Identifier" field. This way, you delegate the signing action to the designated person, and after approval, the document will be automatically sent to them for signing. Click "Save."



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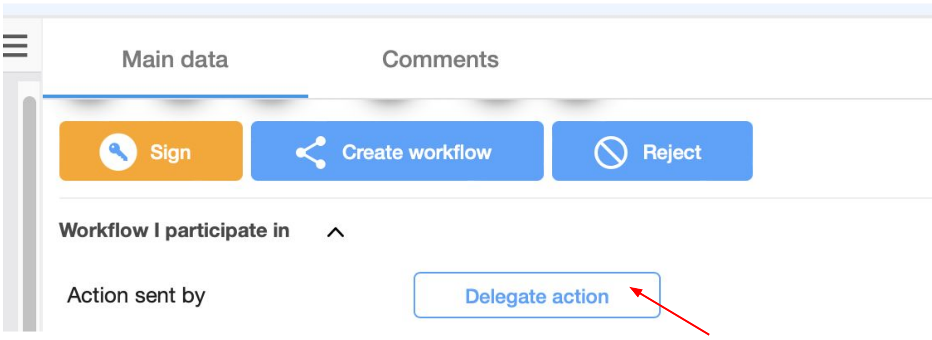
Delegation of actions on incoming documents

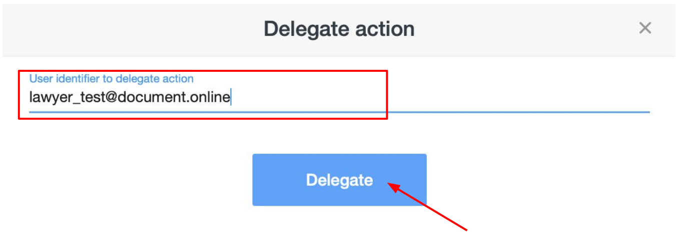
You can delegate the execution of "Approval" or "Signing" actions on documents that have been sent to you.

Important Note: *If you receive a large number of documents for which you are not the designated signer, you can create a separate section, apply a search filter to include those specific documents, and configure automatic delegation for the entire section. This feature may be especially useful during business trips or vacations. For instructions on creating such a section, refer to the section titled* ***"Forwarding of documents, for example, in case of vacation"*** *in the instruction manual.*

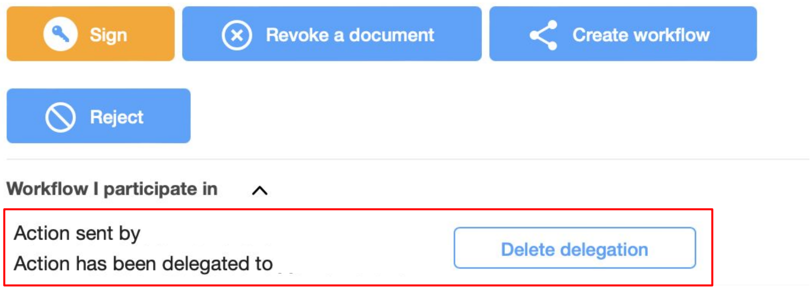
Select the incoming document for which you want to delegate an action, open it, and on the right panel, click the "Delegate Action" button.



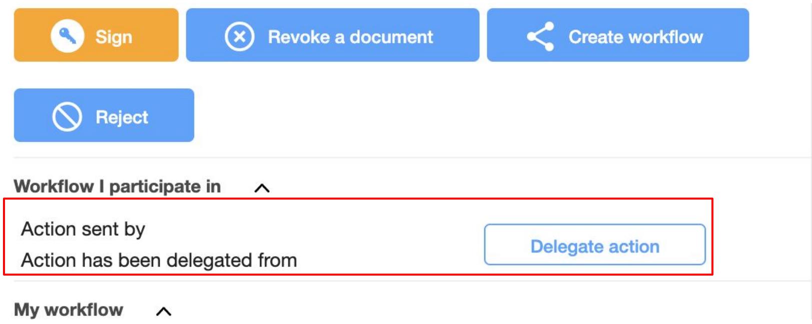
In the opened modal window, enter the user identifier to whom this action will be delegated and click "Save."



The "Delegate Action" button will change to "Remove Delegation," and information about the user to whom the action was delegated will appear next to it.



The user to whom the document action was delegated will find it in the "Sent to Me" section of incoming documents. The right panel will display information about the sender and the delegator.



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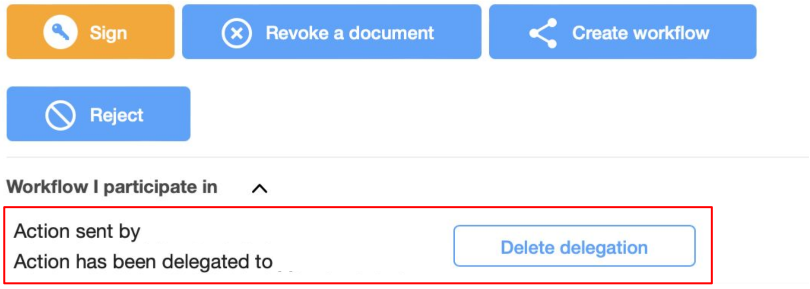
After the delegated actions are completed by the user, the document status will change to "Processed" and the "My Actions" icon will change to "Signed" or "Approved," depending on the assigned action.

Before the user performs the delegated action, you have the option to delete the delegation. In this case, access to the document will be restricted for the user to whom the delegation was initially sent.



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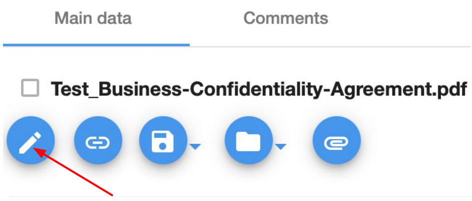
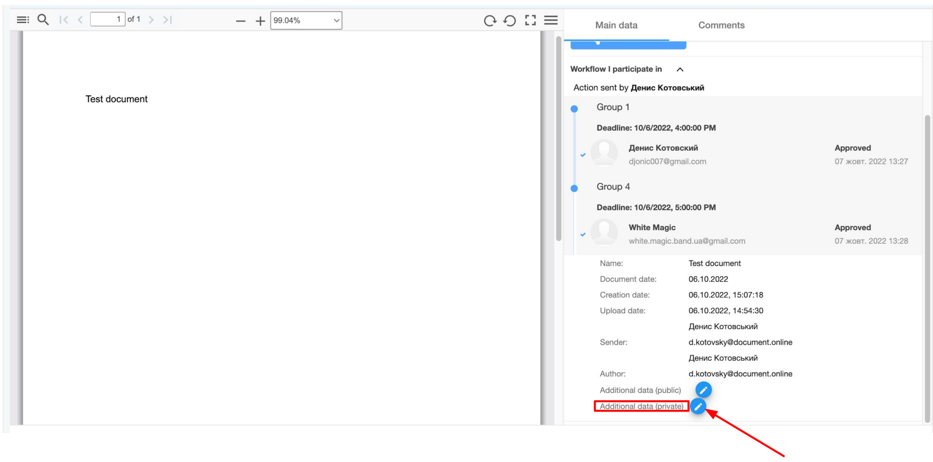
Adding and editing data on documents

The document author has the ability to edit data on the document using the respective button on the document's information panel:

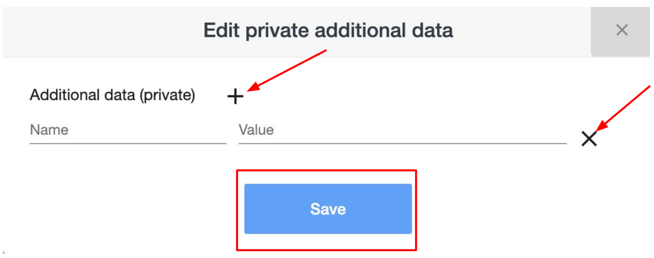


This function is discussed in the "***Editing data on documents***" section.

Additionally, each user can supplement the document with private data (visible only to them). To do this, press the corresponding button on the document's information panel:

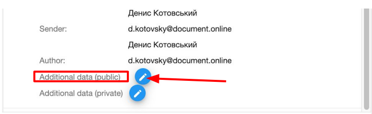


In the opened window, use the + and × buttons to add or remove data, respectively. Afterward, click the "Save" button.

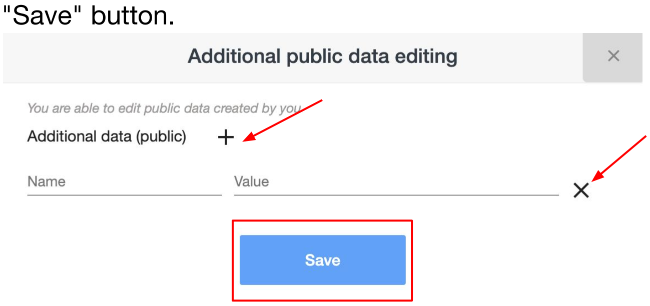


Furthermore, each document recipient can supplement public data on the document.

Added data will be accessible to all service users with access to the document, and only the person who added them can edit. To add public data, press the corresponding button on the document's information panel:



In the opened window, use the + and × buttons to add or remove data, respectively. Afterward, click the "Save" button.



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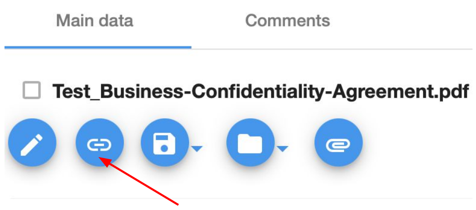
Linking between documents

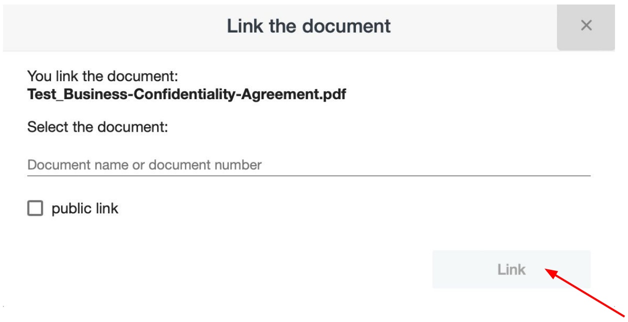
The "Link" function is very convenient when you need to establish a connection between one or several documents in the system, for example, linking a "Work Completion Certificate" to a previously generated "Invoice.

To do this, on the document's information panel, click the "Link" button:



In the opened window, choose the name or number of the document in the system to which the current document needs to be linked:

Attention! If you check the "**Public**" checkbox, the link will be visible to all document recipients. Otherwise, the link will be available only to you.



You can link one or several documents, simply repeat the actions described above.

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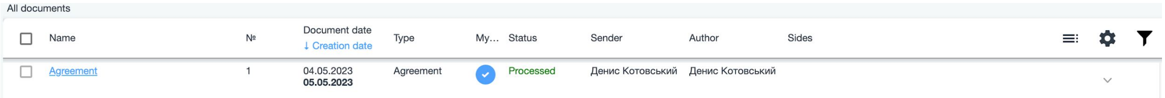
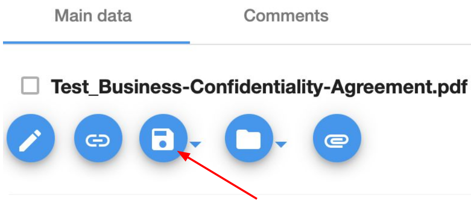
Print and save documents from the system to a computer

To save or print the document, start by opening it.



On the information panel (on the right), select the "Save" button:



Depending on the stage of the approval/signing process the document is in and the format in which it was uploaded, you have the option to download up to 4 document versions. To do this, use the "Save" button and choose the version you need:

- Download the original document (the document format in which it was created, before electronic signatures were applied).

- Download the document with signatures (after electronic signatures have been applied to the document).

.P7S - Download the document with electronic signatures in the .p7s format.

.PDF - Download the document with the signing/approval protocol (a document with a visual display of applied signatures in PDF format and protocols at the end).

- Save the printed form (the document will be downloaded exactly as it appears in the left viewing window).

Important! *The route author (the user who initiated the approval or signing process for the document) can* ***download the document with the approval route protocol****, containing information about those who approved or signed the document, with a timestamp of the action. The option to* ***download the document with the signature protocol*** *is available to all users.*

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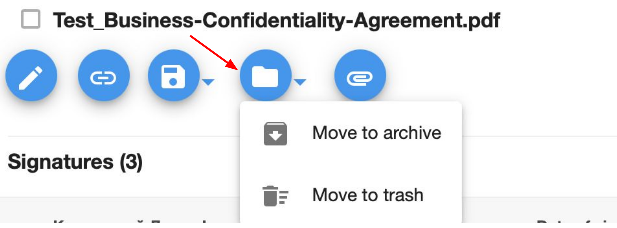
Moving documents to "Archive" or "Trash"

On the information panel (on the right), select the "Move" button:



And choose the necessary action: move the document to the "Archive" or "Trash."

Important! *If a document or a document package has been sent for specific actions (e.g., "Signing") and the assigned actions have not been completed yet, the function to move the document to the "Trash" will be unavailable until the assigned actions are completed.*

Restoring a Moved Document:

If you need to restore a document moved to the "Archive" or "Trash," go to the respective "Archive" or "Trash" folder where the document was previously moved, and repeat the same actions by clicking the "Move" button, after which the "Restore Document" function will be available.

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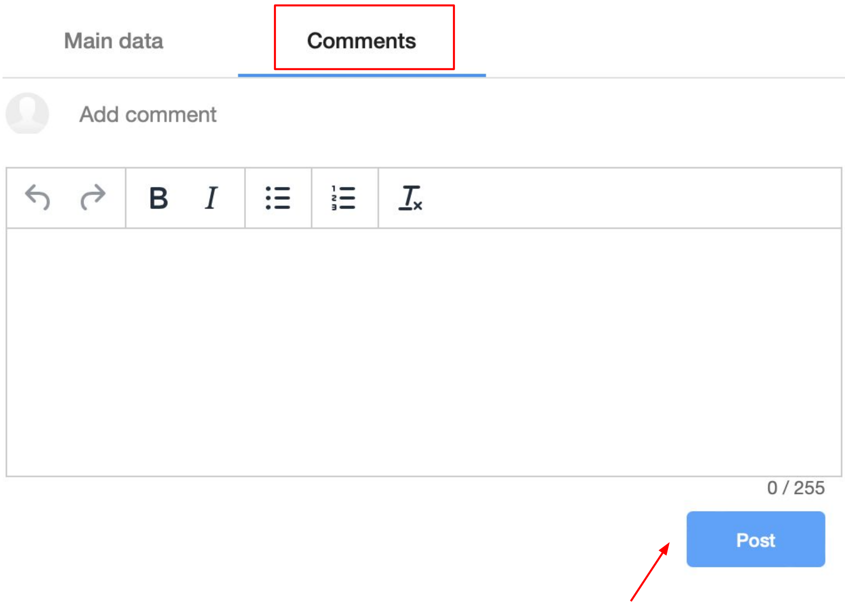
Comments on documents

The document information panel consists of two tabs: "Basic Data" and "Comments."

The "Comments" tab is configured as a chat for exchanging messages with users to whom the document has been sent.

To view the chat history, navigate to the "Comments" tab. To leave a new comment on the document, type the message in the window and press the "Post" button.

Important! *Notifications about comments are received by all users who have access to the document. All comments are saved. If important notes are provided in the comments, the chat can be used as a history of document processing.*



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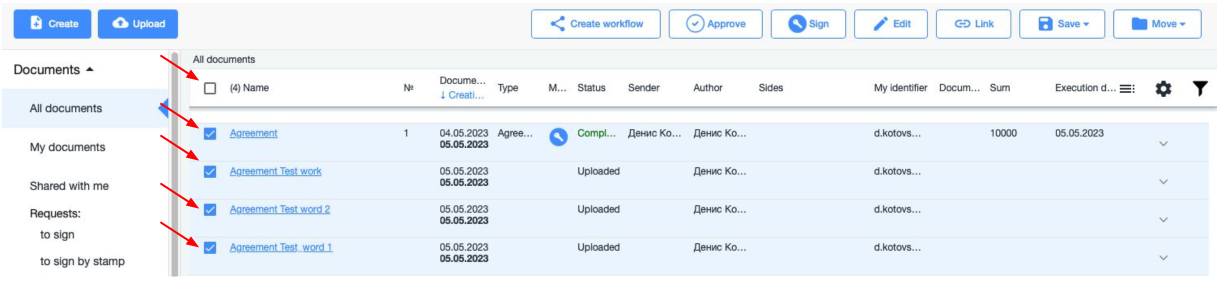
Mass actions with documents

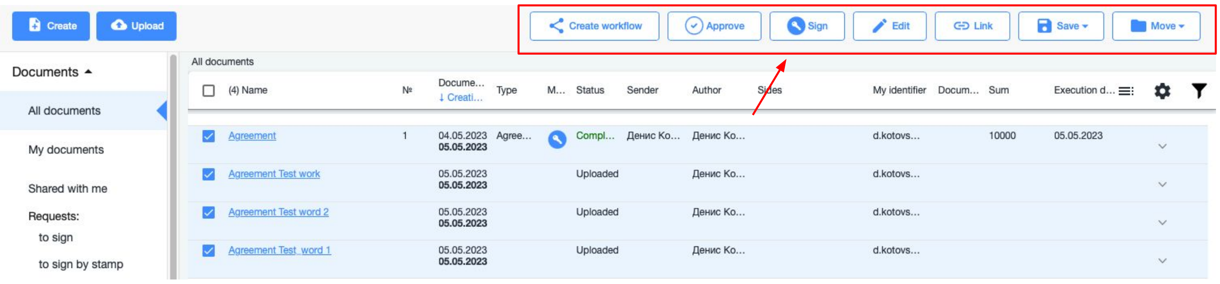
At the top of the workspace, there are buttons for mass actions with the selected document or documents:

Button Name	Functions
Create workflow	Sending the document/documents through a route, which may include multiple groups of participants with assigned deadlines for actions on the document/documents being sent.
Approve	Allows performing the "Approval" action on the selected document/documents.
Sign	Allows performing the "Signing" action on the selected document/documents.
Save	Button for saving the document/documents to the internal storage of the computer.
Move	Button for moving the selected document/documents to the "Archive" or "Trash".

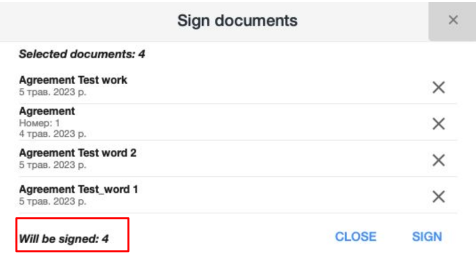
To add a document to the list of documents subject to mass actions, check the checkboxes next to the required documents in the general list. By the way, you can select all documents on the page at once by clicking the checkbox at the top.



Choose the necessary action from the toolbar (e.g., "Sign").



In the modal window, a list of documents selected for mass action will appear. If, for any reason, the operation is not possible for the selected document, the system will notify you and indicate the number of documents that will be processed.



In the modal window, a list of documents selected for mass action will appear. If, for any reason, the operation is not possible for the selected document, the system will notify you and indicate the number of documents that will be processed.

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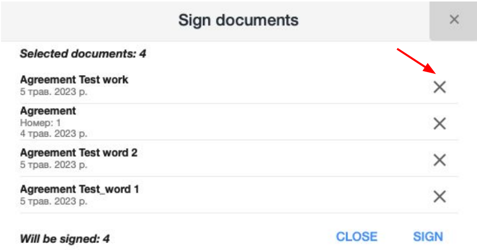
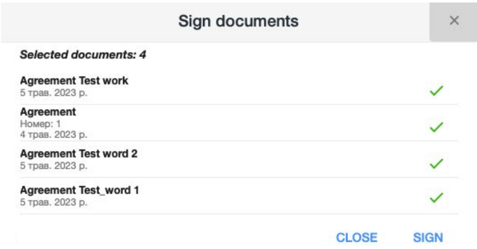
If a document was added to the queue by mistake, remove it from the list by clicking the cross icon next to the name of the erroneous document.



If the list of documents is correct, press the "Sign" button.

Regardless of the number of documents in the list, all of them will be processed by the system.

Close the mass actions window.



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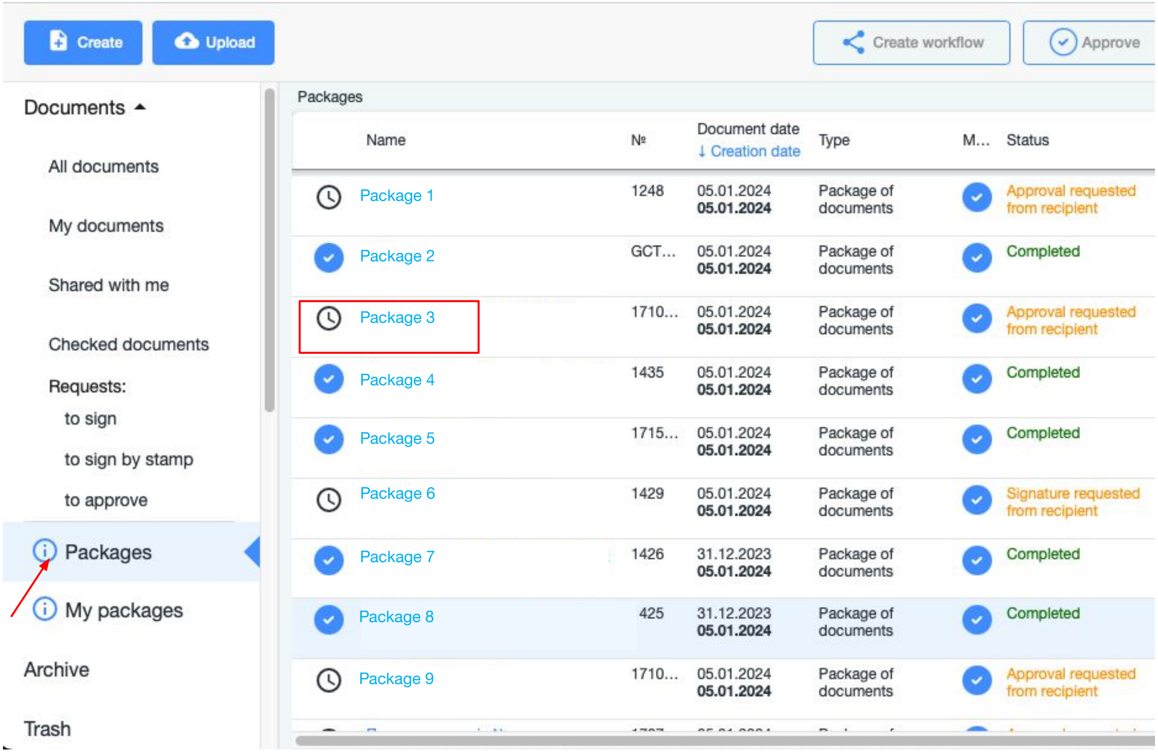
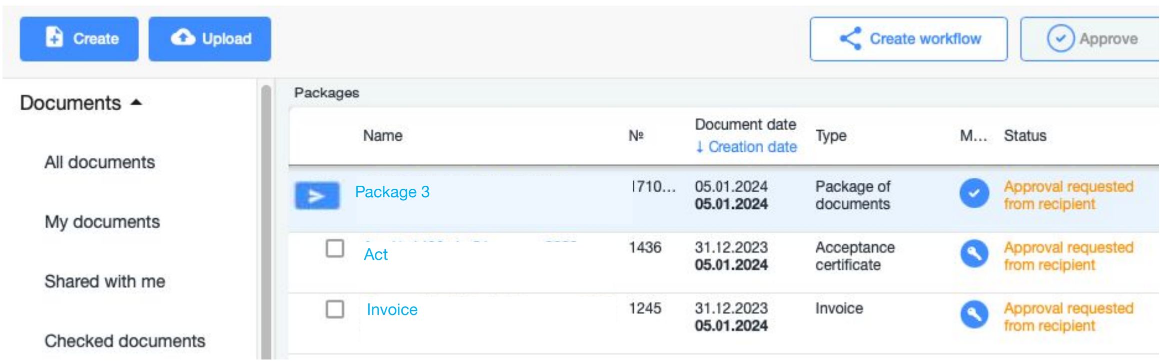
How to open and process an incoming document package

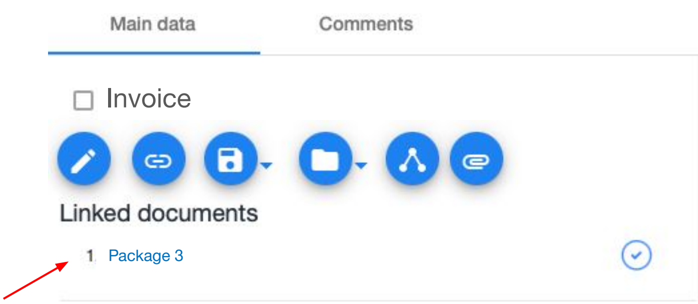
Navigate to the "Packages" section and open the required package by clicking on its name.



After opening the package, you will see a list of documents included in it. You can view them by clicking on the name of the desired document.



Important! *If you open any of the documents in the package, on the right side panel in the "Linked Documents" section, the package will be indicated. This is how you can determine that the document belongs to a specific package.*



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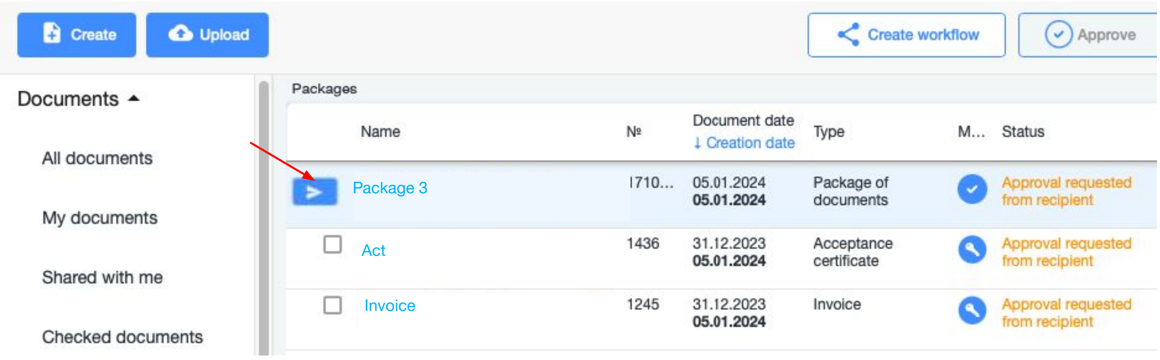
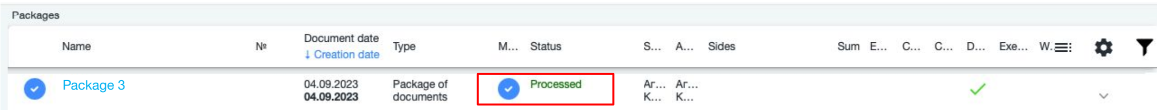
Now you can send the package to the next processing stage according to the specified route. To do this, click on the "airplane" icon.



fter performing this action, a message about sending the package will appear. In the "Status" column opposite the package and the documents included in it, the label "Processed" will appear, and in the "My Actions" column, the icon indicating the action completion will appear.



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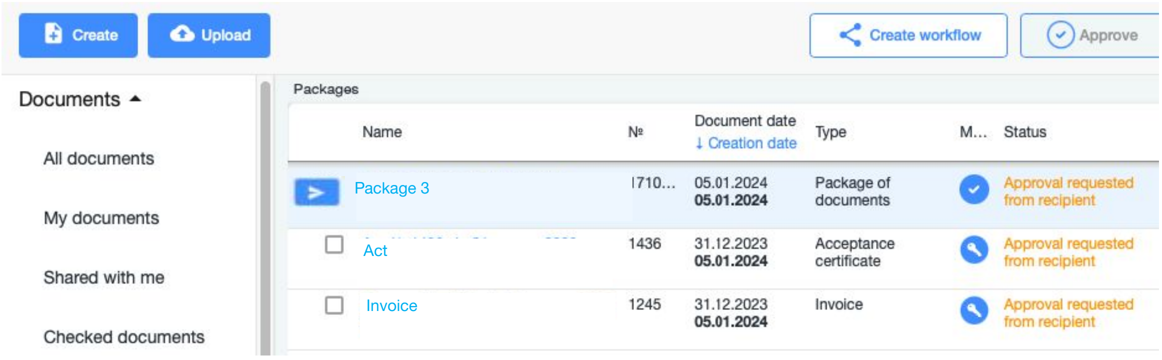
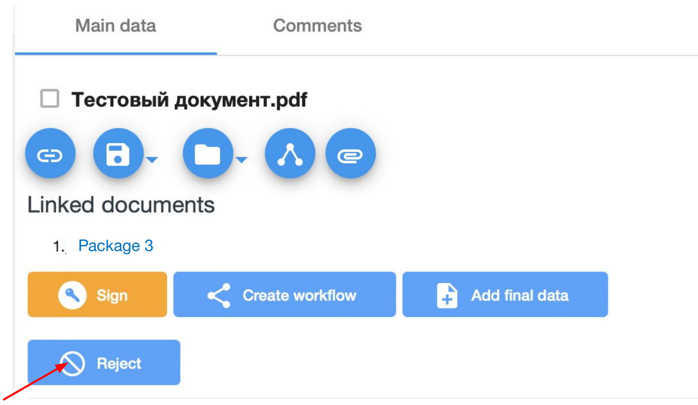
How to reject a package if an error is found in one of the package documents

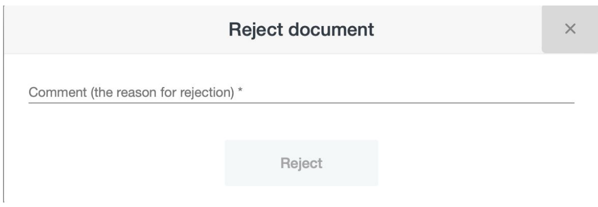
Open the document in the package that needs to be rejected by clicking on its name.



On the right side panel, click the "Reject" button.



Specify the reason for rejection and click "Reject."



The counterparty will receive a notification about the rejection of the document and, consequently, the package of documents with an indication of the rejection reason. In the "Status" column opposite the package and the documents included in it, the label "Processed" will appear, and in the "My Actions" column, the icon indicating the action completion will appear. 

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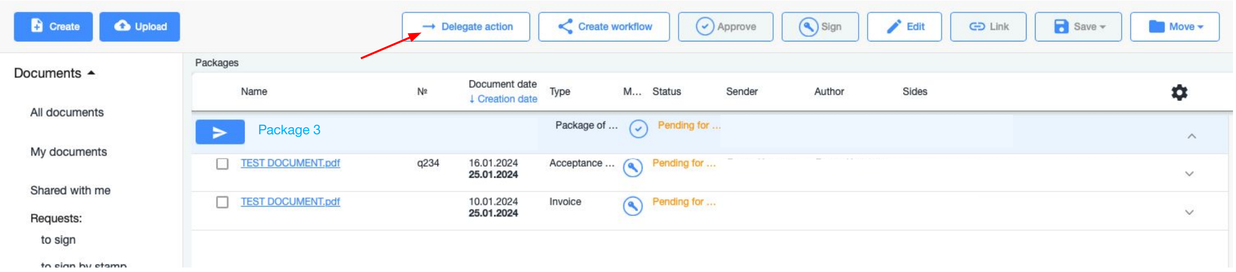
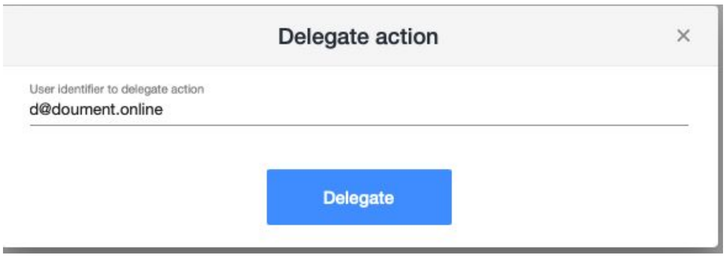
How to delegate actions across a package

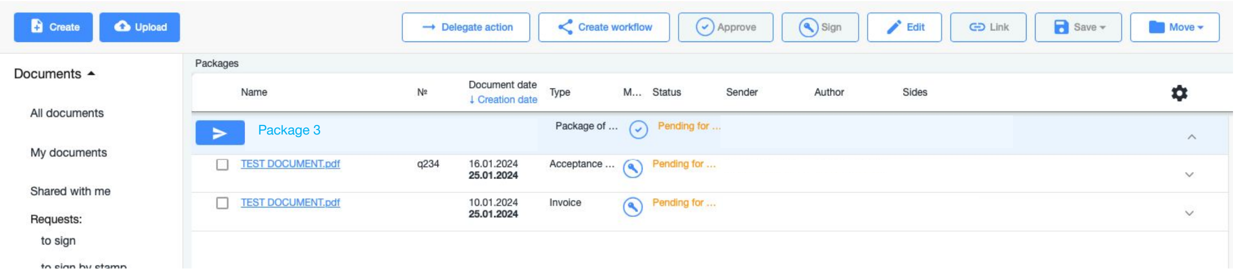
After opening the package, click on the "Delegate Action" button at the top of the mass action buttons panel.



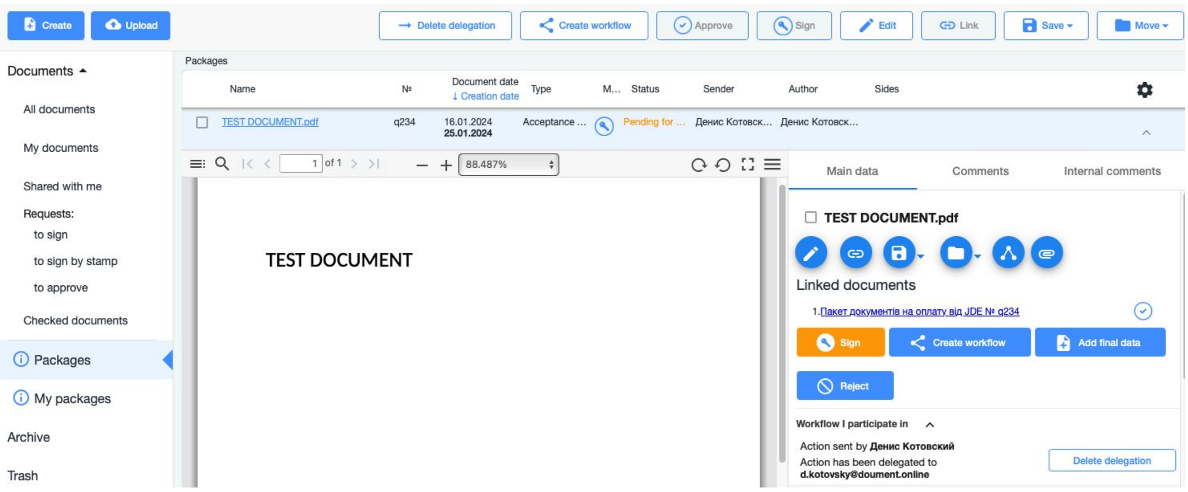
Specify the User ID to whom the action is delegated and click "Save."



At this stage, there will be no changes in the "Status" and "My Actions" columns opposite the package and the documents included in it.



However, when opening each document in the package, on the right side panel, it will be visible that the action on the document is delegated, but the ability to perform the action remains.



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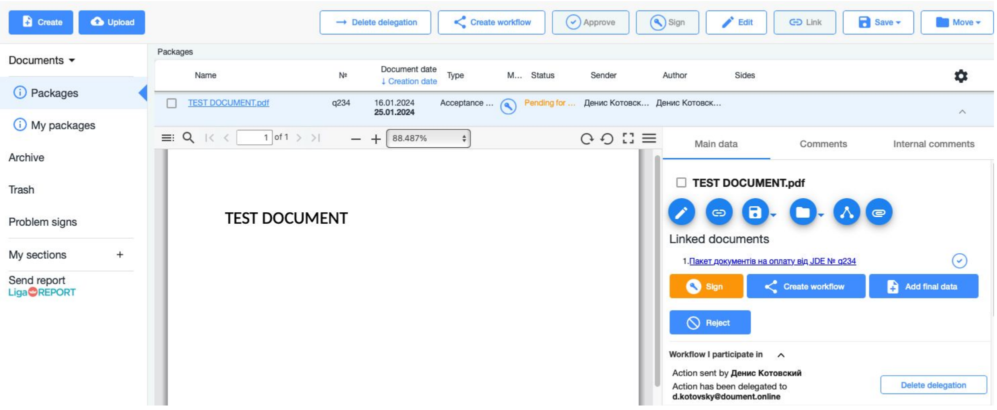
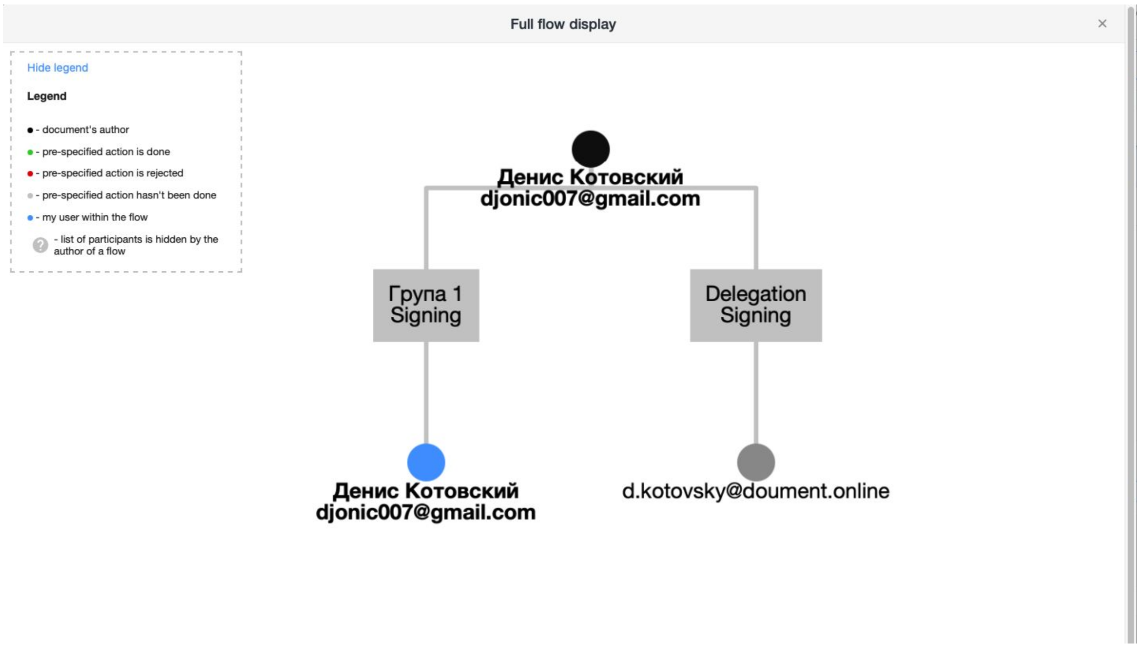
To view the route details in detail, press the "View Full Route" route icon on the right side panel next to the document in the package.



To view the route details in detail, press the "View Full Route" route icon on the right side panel next to the document in the package.



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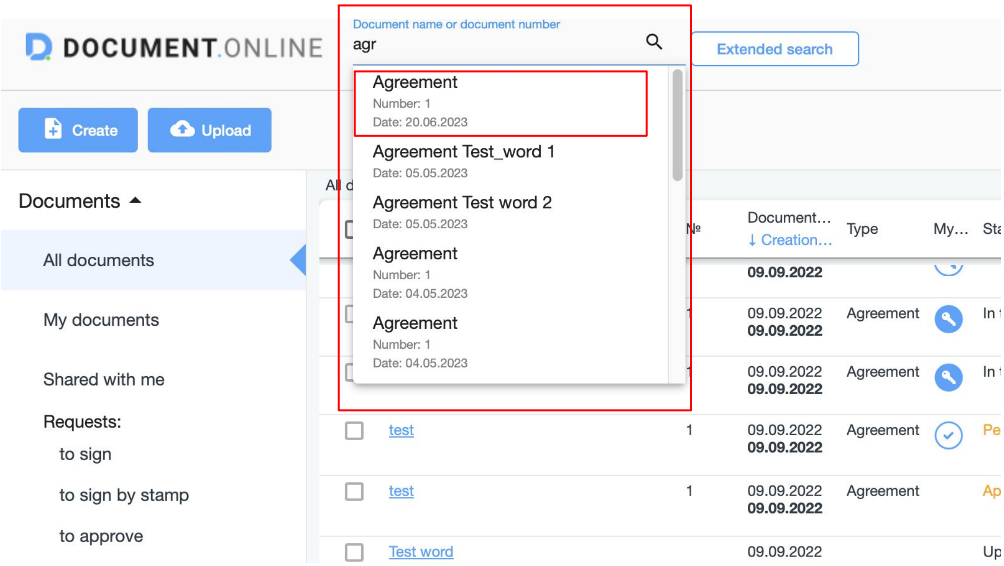
Search for documents in the system

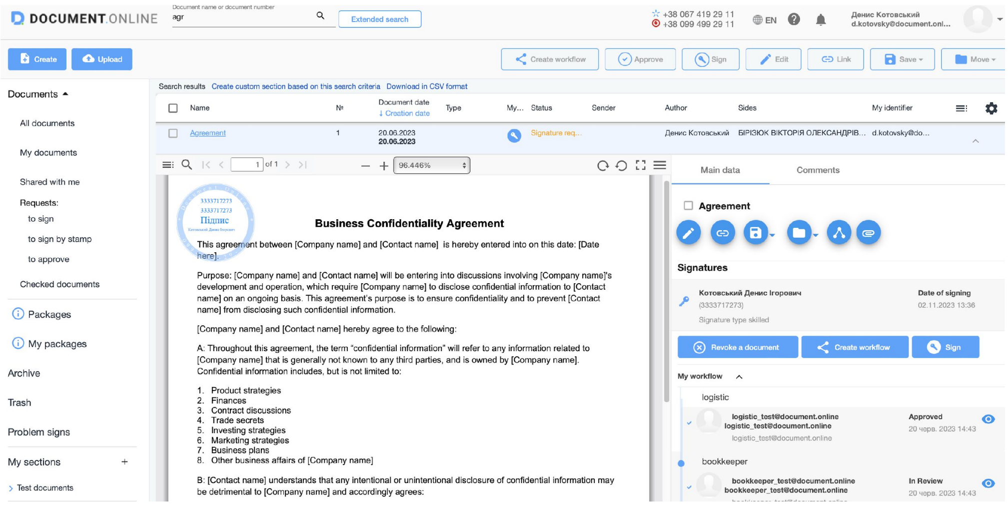
On the portal, there are two available search options – quick search by name or file number and extended search based on various document attributes in the system.

For quick search, enter the name/number of the required file partially or completely in the search field. While entering the data, the system will suggest options that match your query, indicating the name, number, and date of the file. You have the option to select a specific file by hovering over it and clicking on it.

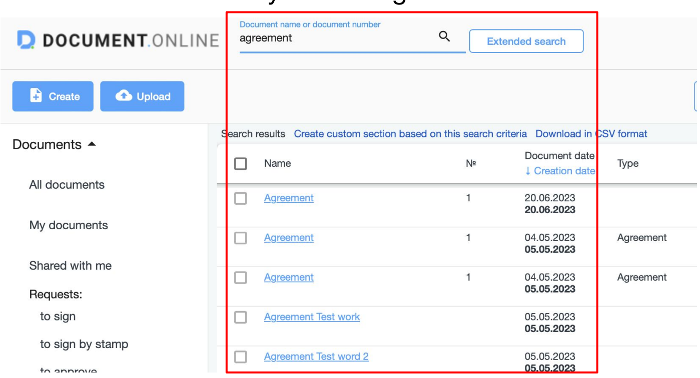
Important! *Quick search looks for files in the "All Documents" section.*



The system will immediately open this file.



If you need all files that match the query, enter the file name completely and press the magnifying glass icon or "Enter." The system will generate a list of all files that match your query.



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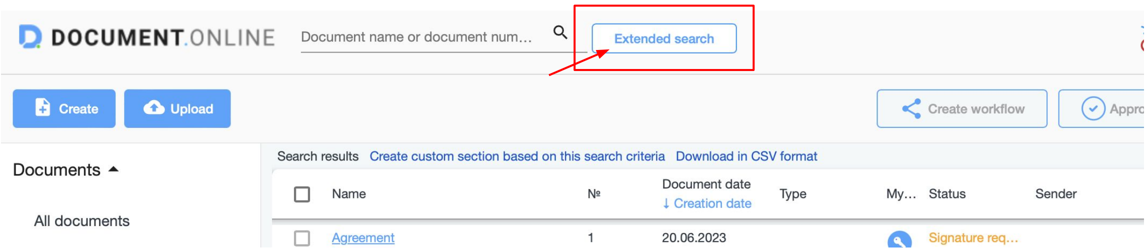
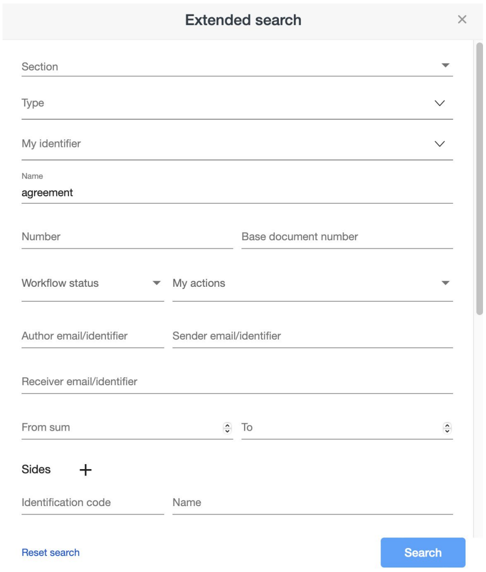
Extended document search

On the portal, there are 2 search options – quick search by name or file number and extended search based on various document attributes in the system.

For advanced search, click on the down arrow icon " Extended search."



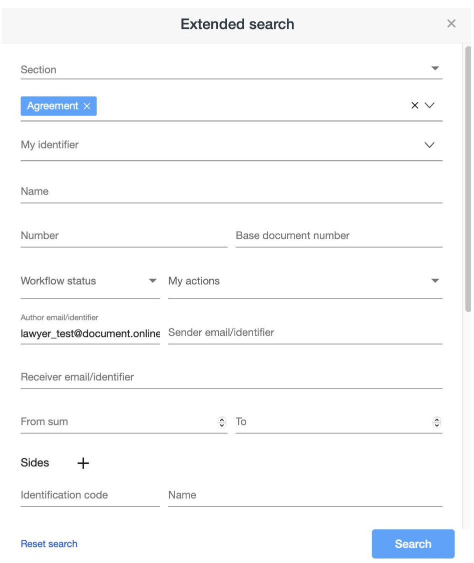
In the extended search window, choose the attribute by which you want to find documents:



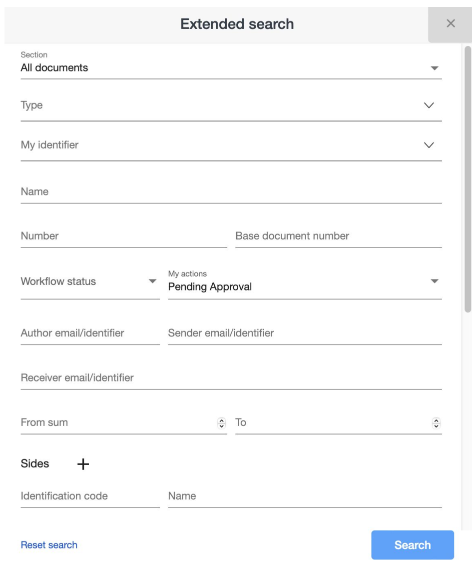
- section;
- document type;
- my identifier;
- document author/sender identifier;
- recipient identifier;
- document date;
- information about parties;
- etc.

For example, let's consider two situations. Suppose you need to find:

1. All incoming Agreements from client



2. All documents in a status waiting for approval



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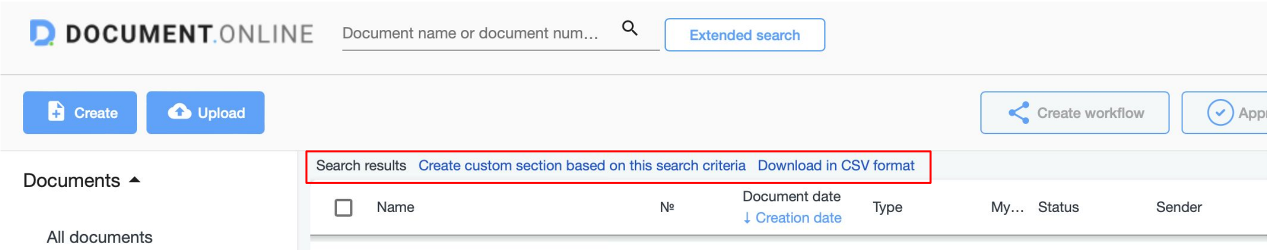
Upon successful search, you will see a list of found documents and possible functions – "Create a section based on this search criterion" and "Download in CSV format."



The "Create a section based on this search criterion" function is similar to creating a new subsection in the "My Sections" section, but the "Create Section" modal window is pre-filled with the criteria used for the search.

The "Download in CSV format" function allows you to download documents as a list to your computer in Excel for further work with the list, for example, to create a register of documents for a specific period.

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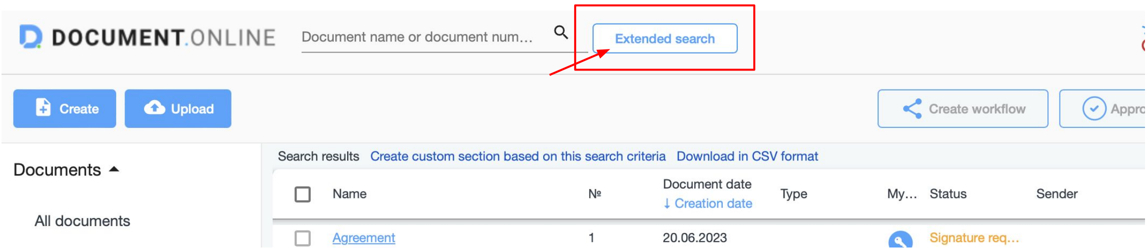
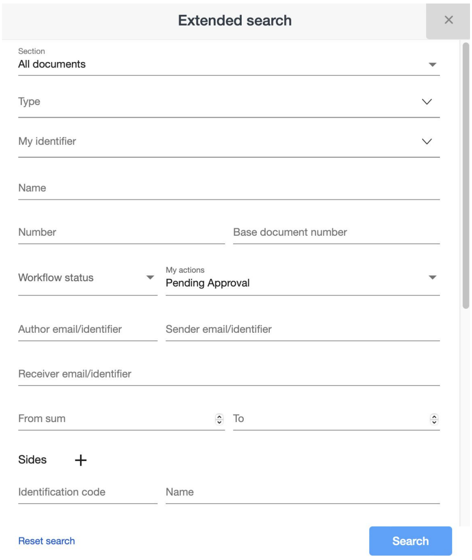
Creating a document report

To generate a report on documents, you can use advanced search to filter documents. To do this, click on the arrow icon "Advanced Search" at the top.

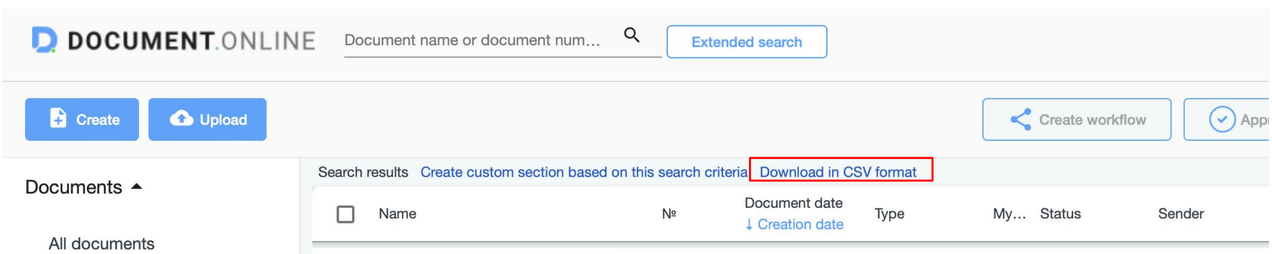


In the opened window, specify the necessary criteria to form the report.
After that, click the "Search" button.



The system will filter your documents based on the specified criteria.

To create a report on these documents, click "Download in CSV format" at the top.



Subsequently, a report will be downloaded based on the found documents.

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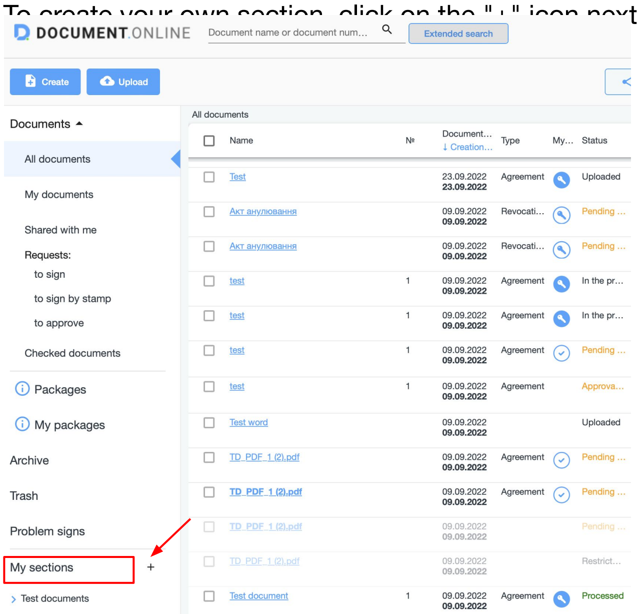
Sorting documents in the system

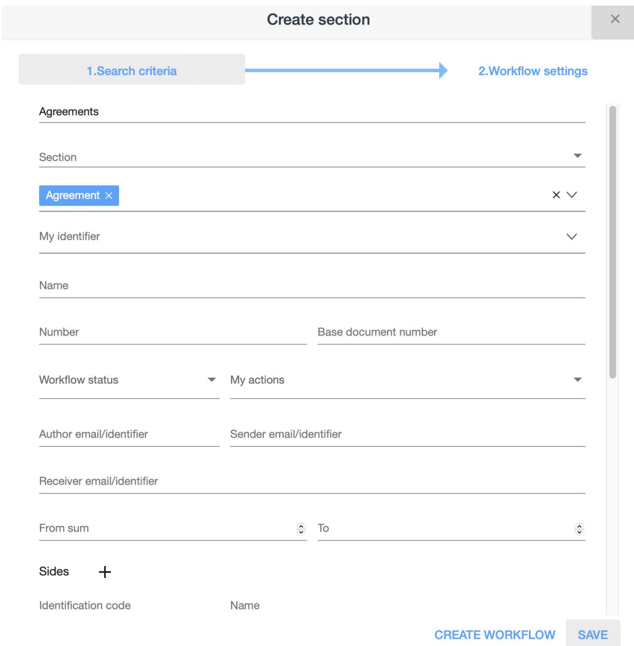
On the platform, you can create a custom section with documents filtered based on specific criteria (filter).

Important! *Custom sections can be used not only to organize documents with the ability to generate standard reports on section documents in the future (**see section "Creating Standard Reports on Documents")**. Custom sections also provide the ability to set up **automatic delegation** and **workflow of documents within the entire section.***

To create your own section, click on the "+" icon next to the "My Sections" title.



In the section creation window, specify the section name and choose filters according to which documents will be included.



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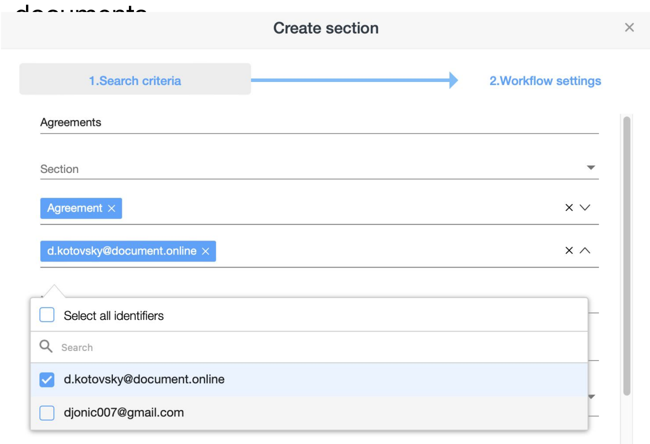
If your account is linked to multiple identifiers, meaning multiple accounts, you can create custom sections separately for each identifier (learn more about using identifiers **here**). In the "My Identifier" field, choose the relevant account whose documents should be included in your section. For example, if you have an archive mailbox among your identifiers, select it to create a separate section for archival documents.



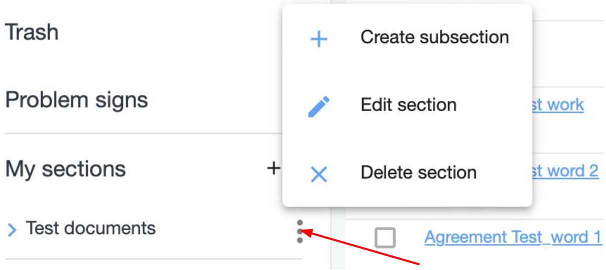
If you need to set up a route or automatic redirection for all documents in this section, click **"Workflow settings."**

Details of these functions are covered in the sections below under the titles "**Automatic Sending of Documents (only for new documents)**" and "**Redirection of Documents, for example, in case of vacation.**"
Setting up access is optional for creating a section.

The section you create will be displayed within the "My Sections" section.

To edit or delete a section, click on the "three dots" icon that appears when hovering over the name of the created section.

You can also create a subsection within a section on the portal. Details of this function are discussed below under the title "Creating a Subsection in a Section."



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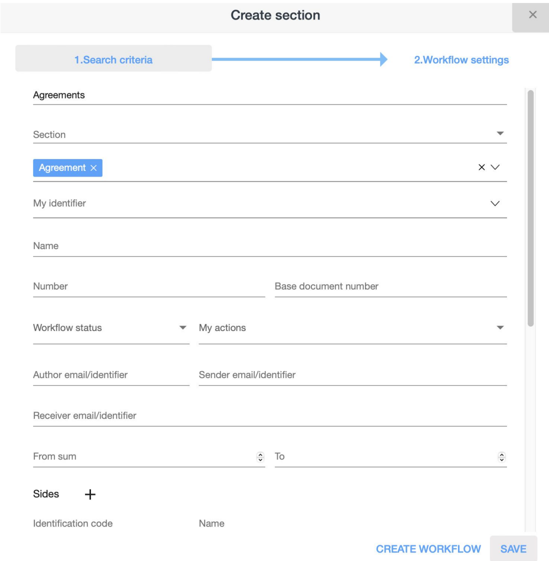
Creating a subsection in a section

To create a subsection in a previously created section, click on the "three dots" icon that appears when hovering over the name of the created section and select "Create Subsection."

In the subsection creation window, specify the subsection name and choose additional filters according to which documents will be included here.

Important! *The subsection will apply the search settings of the section and additionally selected subsection filters. This means that all documents entering the subsection will also be located in the top-level Section.*

Click "Save."

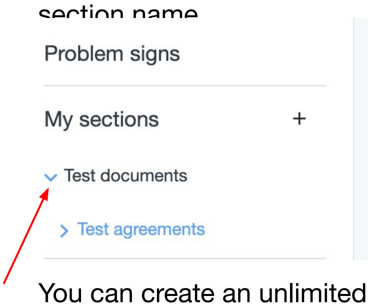


If you need to set up a route or automatic redirection for all documents in this subsection, click "Workflow settings."

Details of these functions are covered in the sections below under the titles **"Automatic Sending of Documents (only for new documents)"** and **"Redirection of Documents, for example, in case of vacation."**

Setting up access is optional for creating a subsection.

The subsection you create will be displayed within the "My Sections" section under the previously created section. To expand the list of subsections in the section, click on the "arrow" icon next to the section name.



You can create an unlimited number of subsections in a section and subsections in subsections, and each of them can have its own approval route configured.

Important! *If there is an approval route set in the section or subsection, and the document falls under the configured subsection search parameters, only the approval workflow of the subsection will be applied to the document.*

Important! *If, according to the search parameters, a document falls into several sections with configured access parameters, the document will be subject to the approval workflow created last in the system. In the other sections, there will be an "exclamation mark" icon with information that no route is configured for the document from that section.*

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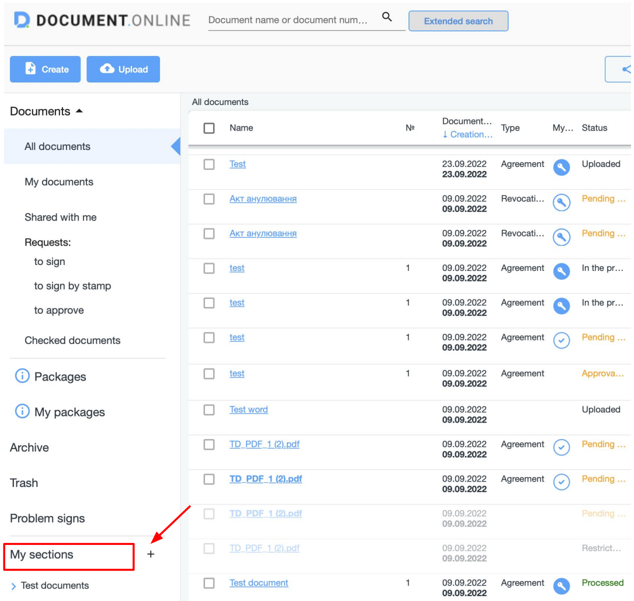
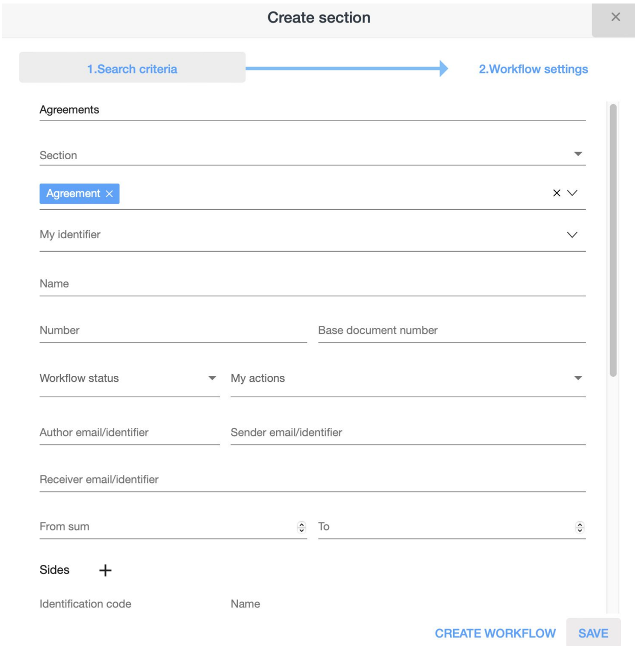
Automatic sending of documents (only for new documents)

To set up automatic sending of documents, you need to create a custom section with documents filtered by specific criteria.

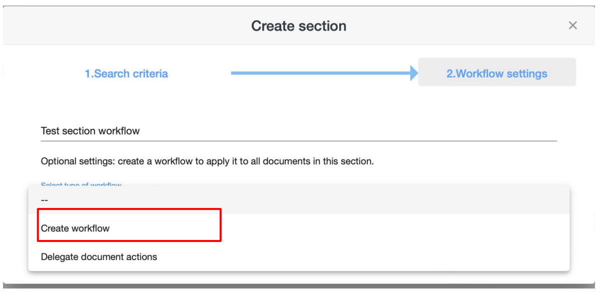
Click on the "+" icon next to the "My Sections" title.



In the section creation window, specify the section name and choose filters according to which documents will enter it. Click on ”Workflow settings."



Choose the type of access setting as "Workflow settings”.



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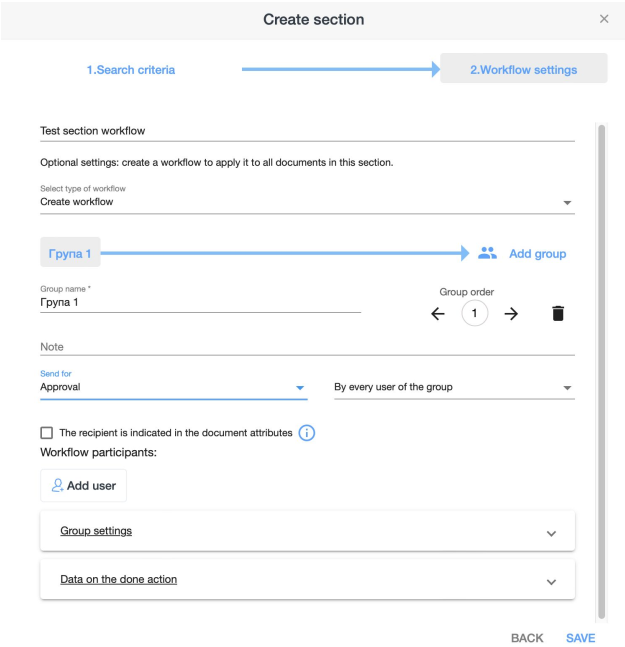
Create approval workflow for the section, and they will automatically be assigned to all new documents that meet the criteria of the section. Click "Save."



Important! *All documents that meet the specified criteria will appear in the section. However, approval routes will be automatically assigned only to new documents entering this section.*

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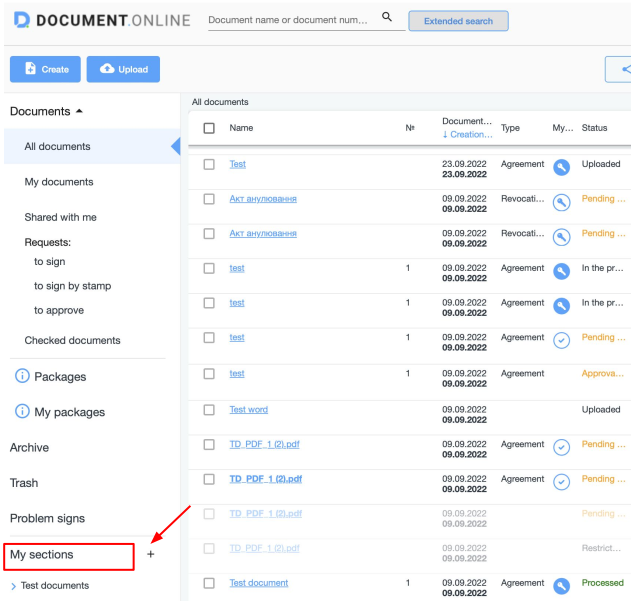
Forwarding of documents, for example, in case of vacation

To set up automatic documents forwarding, you need to create a custom section with documents filtered by specific criteria.

Click on the "+" icon next to the "My Sections" title.



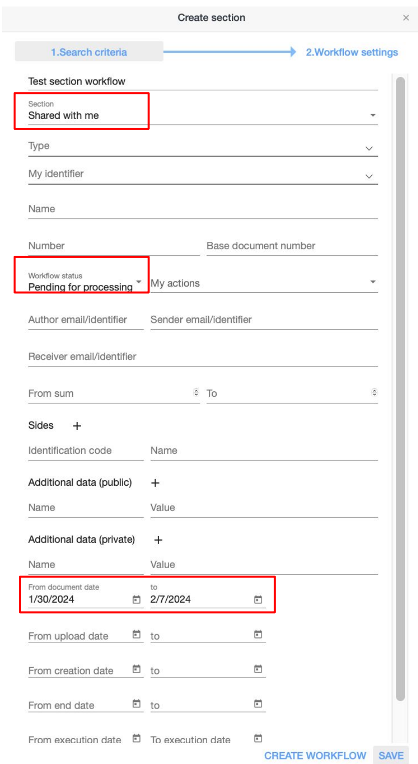
To do this, click on the "+" icon next to the "My Sections" title.

For example, if you need to delegate document actions to your colleague during your vacation, choose the following filters to create the section:

- Section: Shared with me
- Status: Pending for processing
- Vacation period: Created date from ... to ...

You can also specify additional parameters, such as Document Type or Email/Sender Identifier, if necessary. Click ”Workflow settings.”

Important! *If you want to forward packages of documents for execution, choose the filter "Section - Packages" instead of "Section - Shared with me."*



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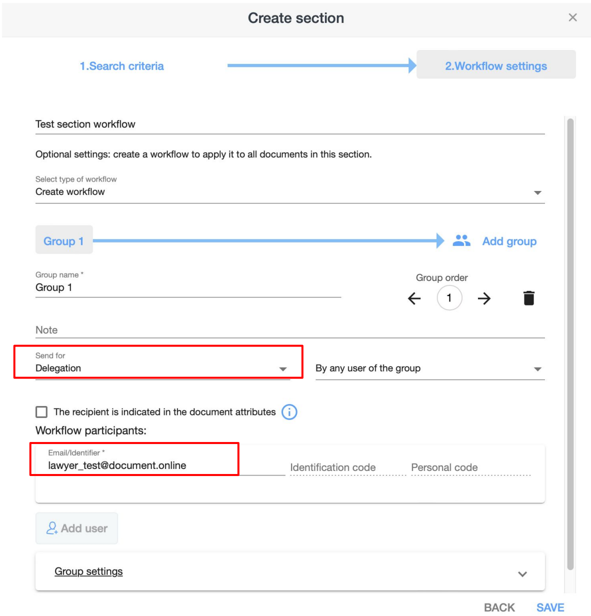
Choose the type of access setting as ”Workflow settings" and the action as "Delegate." Click "Add User.”

Enter the email of the user to whom the actions on the documents of this section will be delegated. This feature is convenient, for example, during business trips or vacations when there is a need to process incoming documents. Click "Save.”

Enter the email of the user to whom the actions on the documents of this section will be delegated. This feature is convenient, for example, during business trips or vacations when there is a need to process incoming documents.

Click "Save."



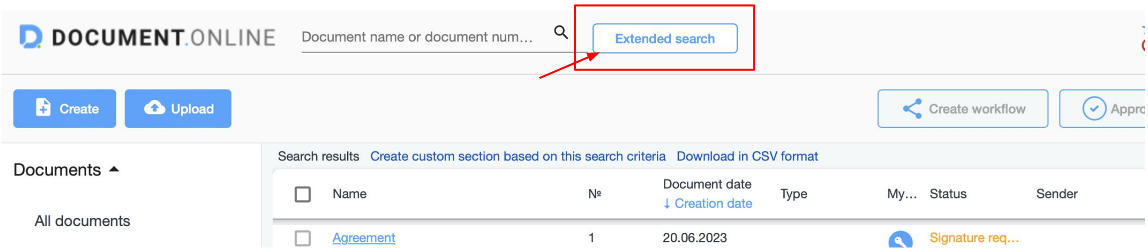
Important! *All documents that meet the specified criteria will appear in the section. However, automatic forwarding will only work for new documents entering this section.*

Creation of standard reports on documents

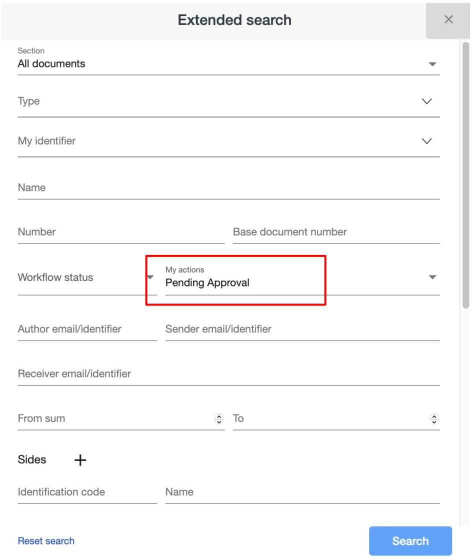
Creating standard reports for documents is convenient when you need to generate multiple reports with different parameters. To avoid specifying these parameters each time in the advanced search, create relevant sections corresponding to the required reports.

The process of creating a section is explained in the section above titled "Sorting Documents".

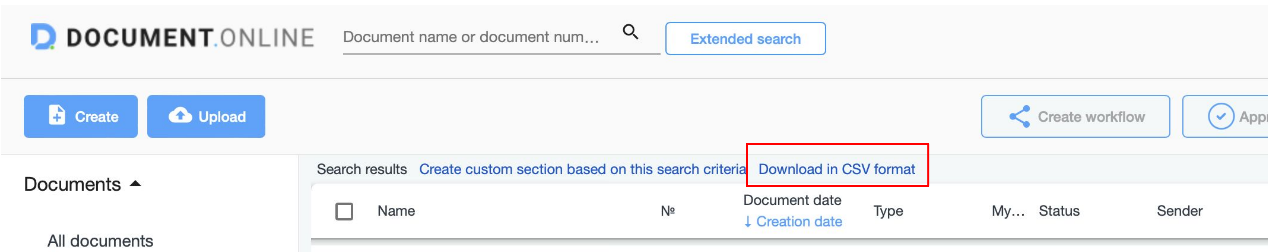
When you need to generate a report, go to the respective section and click the Extended search button.



In the search window, all parameters of the section you created will already be filled in. You can then edit specific search criteria (e.g., set a new criterion like "Pending Approval"). After that, click "Search."



A list of documents that meet the specified filters will appear. To generate a report, click "Download in CSV format," and a list of found documents with all the columns displayed on the screen will be downloaded to your computer.



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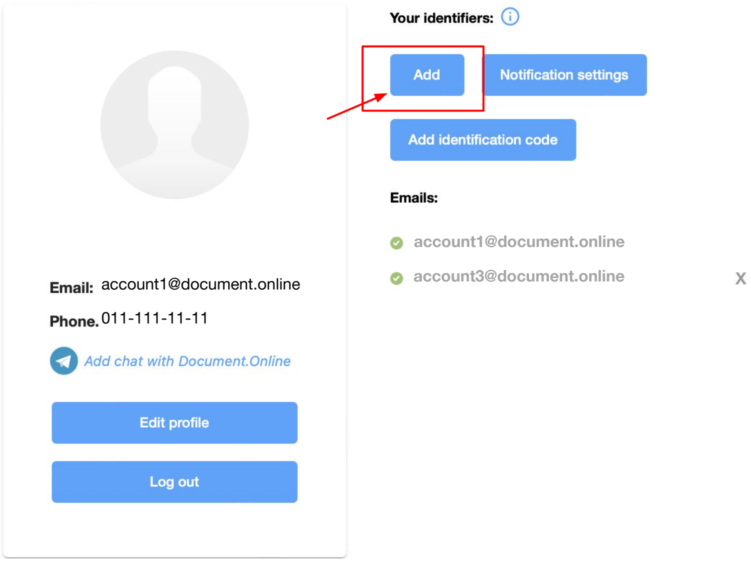
Bind additional identifier

If you have multiple accounts or several email addresses registered in the Document.Online system and want to work with all documents in a single account, use the functionality of binding an additional identifier.

An identifier is a user account that can be linked to your account. You can add an unlimited number of identifiers to your account and gain access to all documents belonging to these identifiers. This is very convenient if you have multiple accounts (you can combine them and work in a unified space) or if you need to monitor the work of subordinates.

Important! *When working with documents of added identifiers, you will have access to all functions except editing data on the documents.*

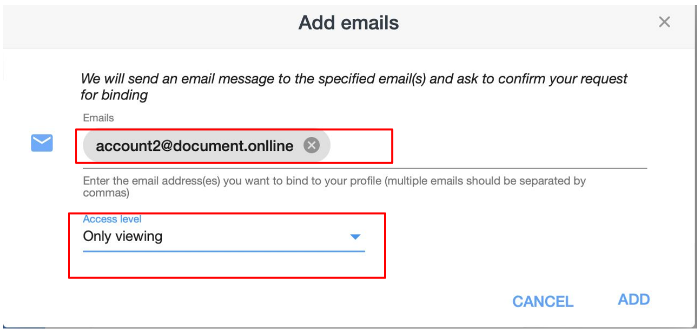
To link a new identifier, click the "Add" button in the "Your Identifiers" section.



In the dialog box that opens:

1. Specify the email address (or list of addresses separated by commas) of the documents you want to see in your account.
2. Choose the level of access you want to have with the added accounts: "Full (all actions with documents)" or "View only."
3. Click the "Add" button.

Important! *Documents of added identifiers will be accessible in your account after confirmation of the binding by the users of the added email addresses.*



4. The identifiers you added will appear in the list with the status "Not confirmed" (symbol "?" before the identifier name).
5. If an added identifier does not confirm your request for a long time, resend the request by clicking on the envelope icon.

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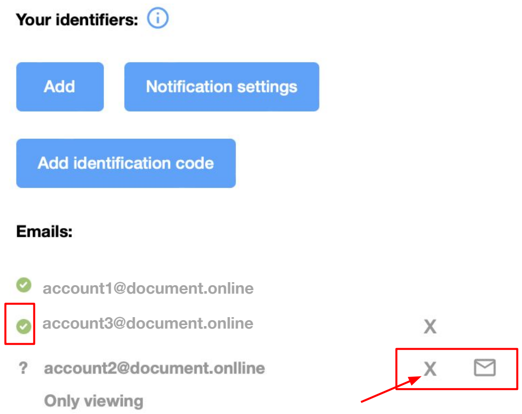
4. The identifiers you added will appear in the list with the status "Not confirmed" (symbol "?" before the identifier name).
5. If an added identifier does not confirm your request for a long time, resend the request by clicking on the envelope icon.
6. After confirmation of the binding by the identifier, the identifier's status will change to "Identifier active."



From this moment, your account will display not only documents that were created or sent to you but also all documents created or sent to the linked identifier.

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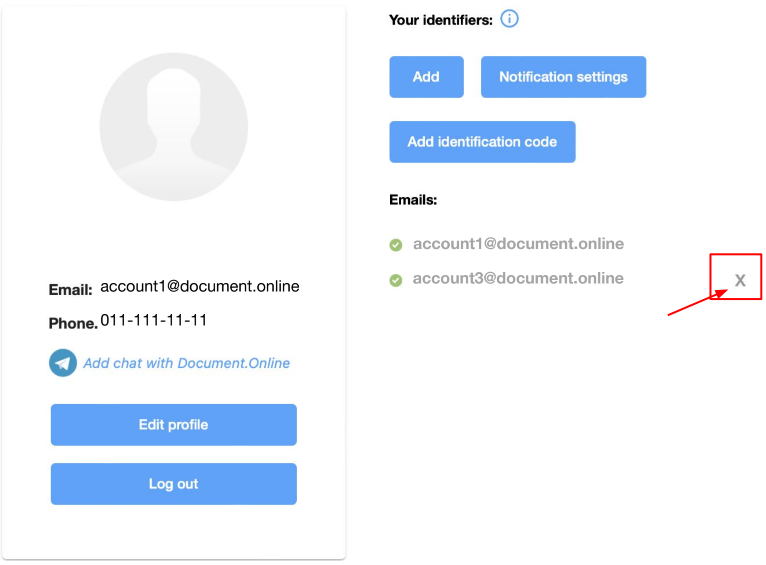
Deleting an additional identifier

An identifier is a user account that can be linked to your account. You can add an unlimited number of identifiers to your account and gain access to all documents belonging to these identifiers. This is very convenient if you have multiple accounts (you can combine them and work in a unified space) or if you need to monitor the work of subordinates.

If, for some reason, you no longer need to receive documents from an added identifier, you can delete it by clicking the "X" icon next to the relevant identifier.



You can delete both active and unconfirmed identifiers.

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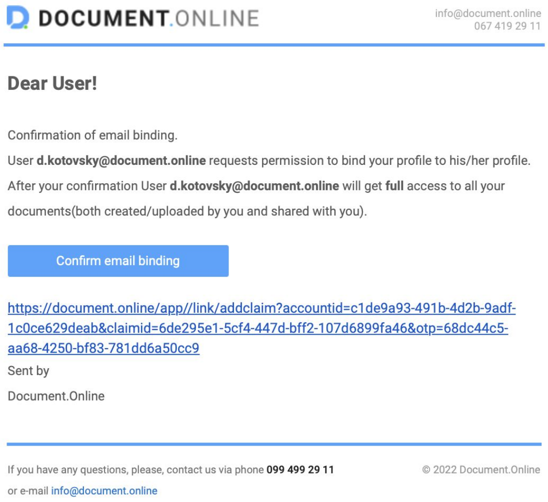
Confirmation of actions by the binding identifier

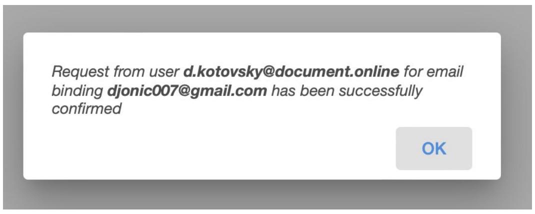
An identifier is a user account that can be linked to your account. You can add an unlimited number of identifiers to your account and gain access to all documents belonging to these identifiers. This is very convenient if you have multiple accounts (you can combine them and work in a unified space) or if you need to monitor the work of subordinates.

1. **Confirmation of Binding Your Account to Another User**
If your account (or email) has been linked to another account in the Document.Online system, you will receive an email requesting confirmation of this action. The email will specify the email of the account that wants to access your documents and the access level—either "all actions" with documents or only "view."

To grant permission to access your documents, click the "Confirm Binding" button.



You will be redirected to document.online and see a notification of the successful binding of your email. Click "OK."



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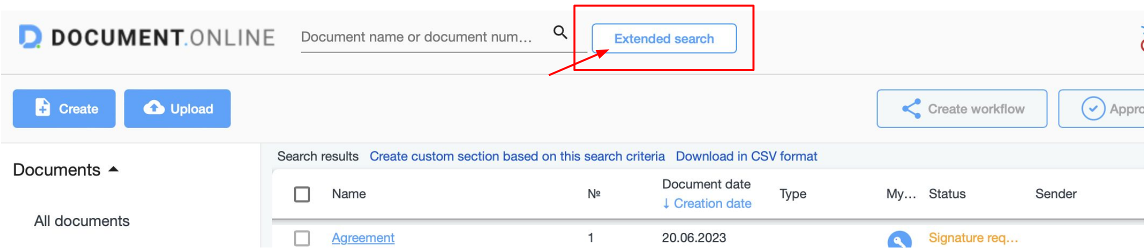
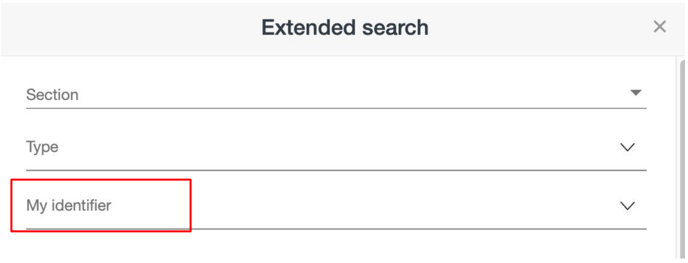
Search for documents belonging to a certain identifier

An identifier is a user account that can be linked to your account. You can add an unlimited number of identifiers to your account and gain access to all documents belonging to these identifiers. This is very convenient if you have multiple accounts (you can combine them and work in a unified space) or if you need to monitor the work of subordinates.

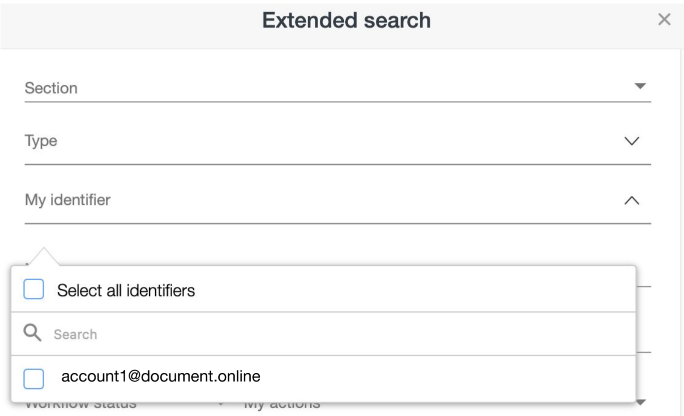
Go to ‘Extended search' by clicking the arrow in the top search panel.



In the ‘Extended search' window, use the criterion 'My Identifier.'



Choose the identifier for which you need to find documents and click the 'Search' button."



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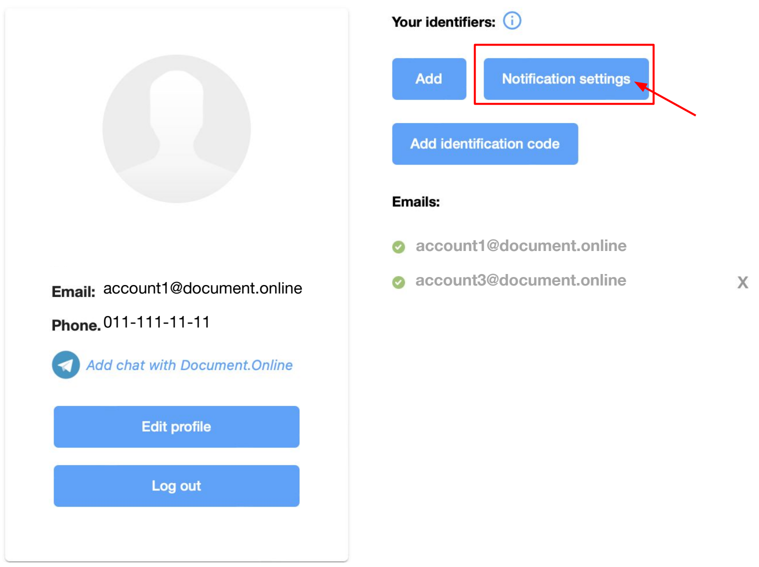
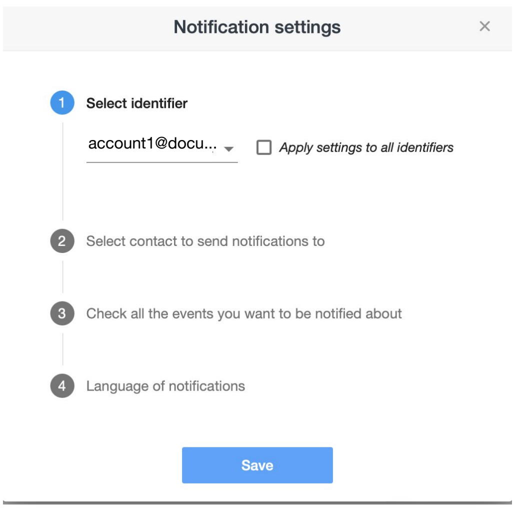
Setting up notifications from binded IDs

An identifier is a user account that can be linked to your account. You can add an unlimited number of identifiers to your account and gain access to all documents belonging to these identifiers. This is very convenient if you have multiple accounts (you can combine them and work in a unified space) or if you need to monitor the work of subordinates.

If you want to receive notifications about actions on documents from linked identifiers, click on the "Notifications settings" button in your profile window:

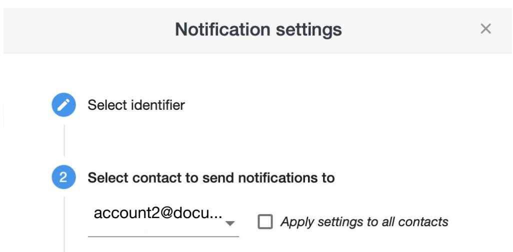


In the opened window:



1. "Choose an identifier to configure" - a user/identifier for which actions will trigger notifications. Choose one identifier from the list or check the box "Apply settings to all identifiers" if you want to configure notifications for all linked identifiers at once.

2. "Select a contact for notifications" - the user/identifier who will receive email notifications configured in the first step. This can be your account or any other from the list of identifiers.



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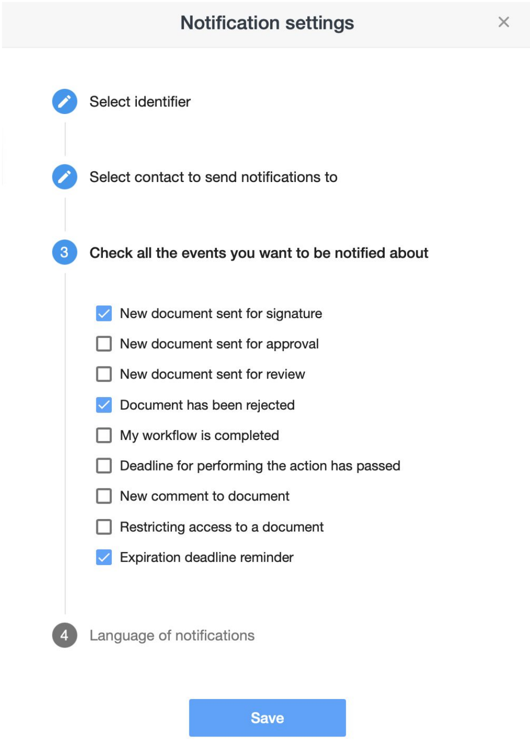
3. Mark events for which you want to receive email notifications" by placing or removing a checkmark next to the corresponding document action: Choose events like "Document Created," "Document Approved," etc.



4. Select the language of notifications in which you want to receive messages via email.
5. Click the "Save" button.

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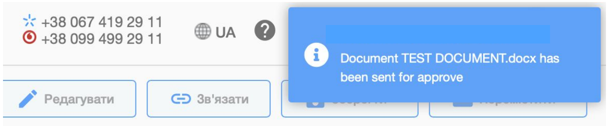
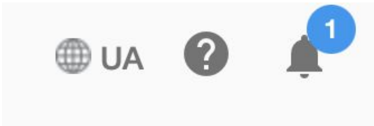
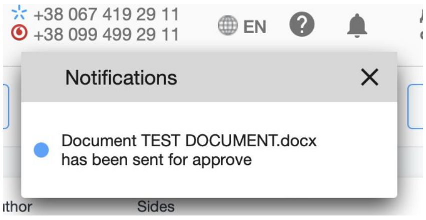
System notifications in the account

As changes occur to documents in the system in real-time, notifications will appear next to the bell icon at the top of the screen:

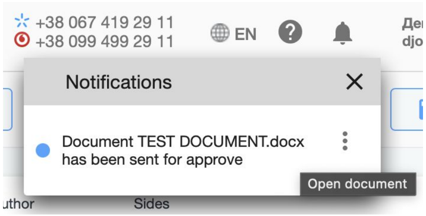




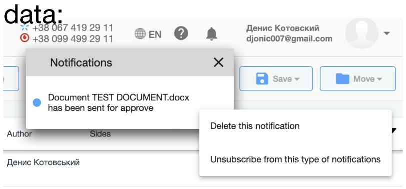
Clicking the bell icon will prompt the system to display notifications with information about the incoming action:



By clicking on a specific notification, you will open the corresponding document:



Clicking on the "three dots" located next to the notification opens a window to clear the notification data:



Additionally, upon refreshing the browser page, all previously sent notifications will be cleared.

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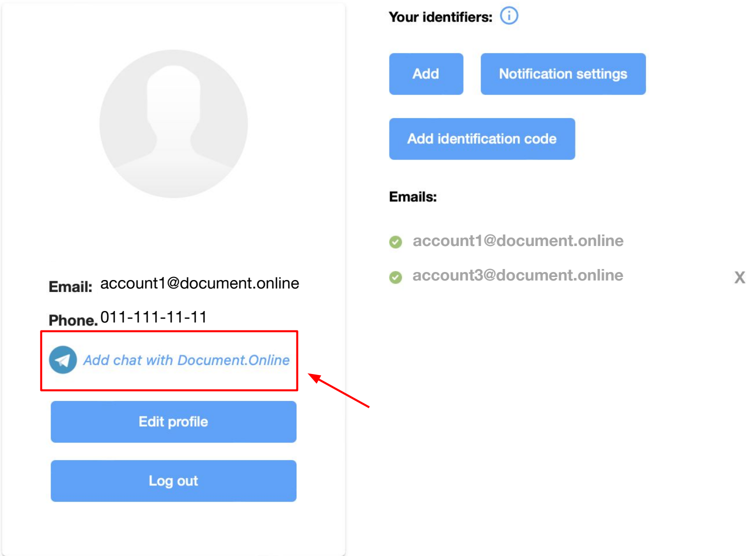
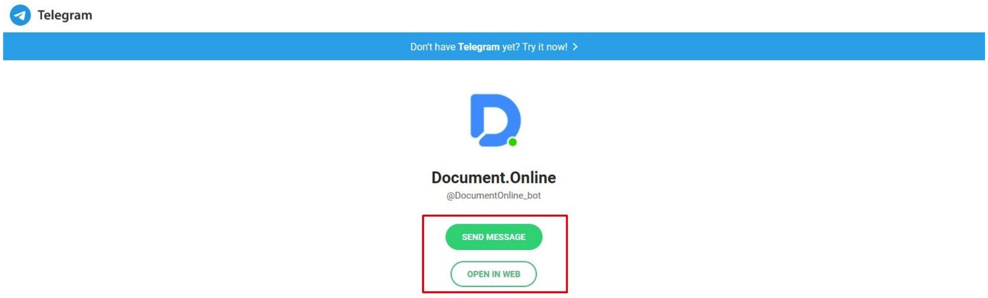
Setting up notifications in Telegram

You have the option to use Telegram as a communication channel with Document.Online. To do this, you need to connect to our chatbot, where notifications from the service will be sent.

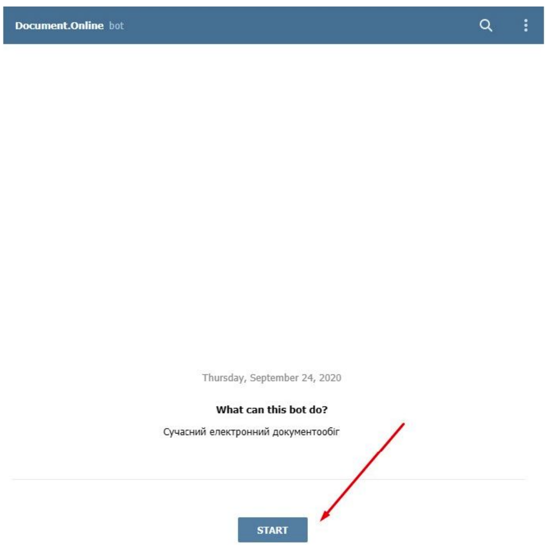
Click on the profile picture, and then on 'Profile Settings.' and click 'Add chat with Document.Online.'



Use the 'Send message' button if you have the Telegram app installed on your computer or click 'Open in web' to access the web version of the messenger.



Click 'start.' The chatbot is already connected.



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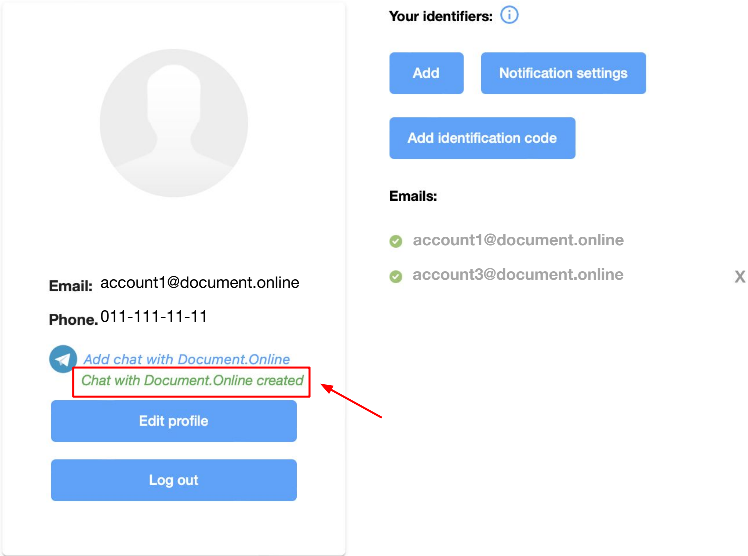
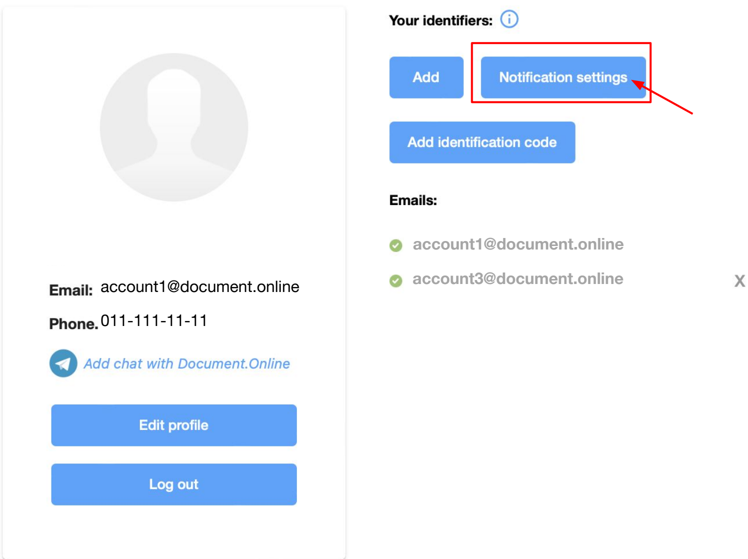
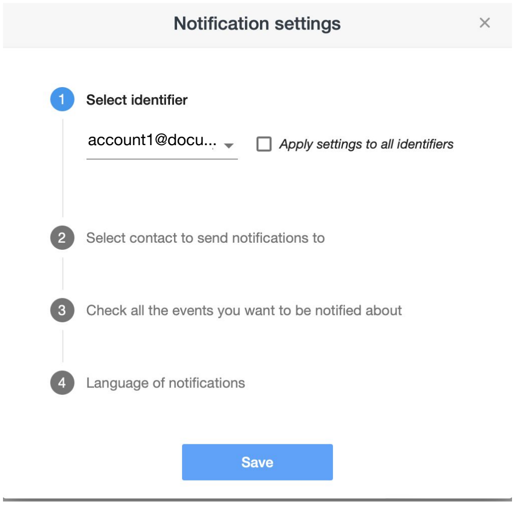
Also, after linking Telegram, a corresponding message will be displayed in 'Profile Settings.'



Now you need to configure which notifications will be sent to Telegram. Click on the ‘ Notifications settings' button in your profile window:

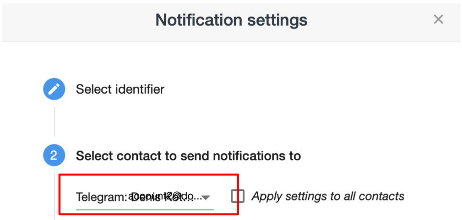


In the opened window:

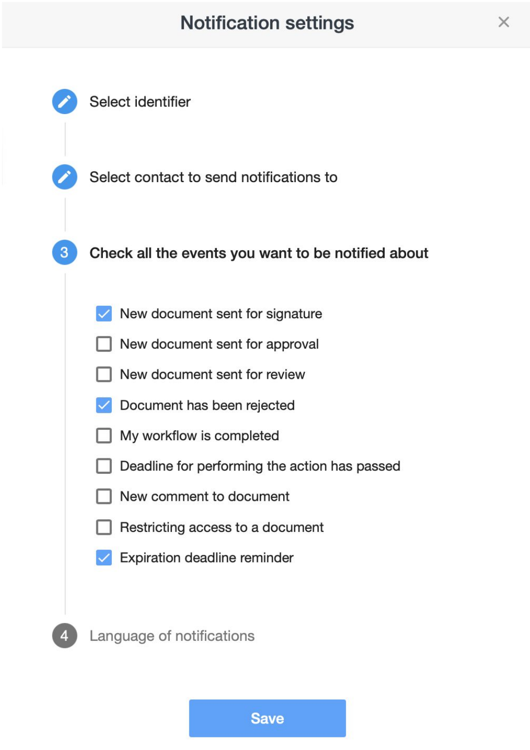


1. 'Select an identifier to configure' - choose a user/identifier for which actions will trigger notifications. Choose from the list or check 'Apply settings to all identifiers' if you want to set up notifications for all linked identifiers at once.
An identifier is a user account that can be linked to your account. You can add an unlimited number of identifiers to your account and access all documents associated with these identifiers. This is very convenient if you have multiple accounts (they can be combined and work in a unified space) or if you need to monitor the work of subordinates.

2. 'Select a contact for notifications' - Your Telegram.



2. 'Uncheck events for which you want to receive email notifications' by checking or unchecking the box next to the corresponding document action:



4. Select the language of notifications in which you want to receive messages via email.
5. Click the "Save" button.

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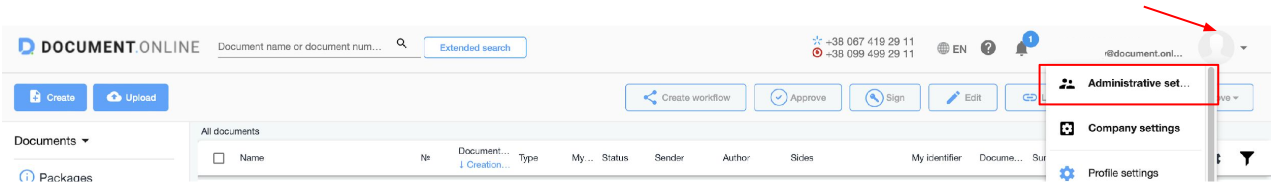
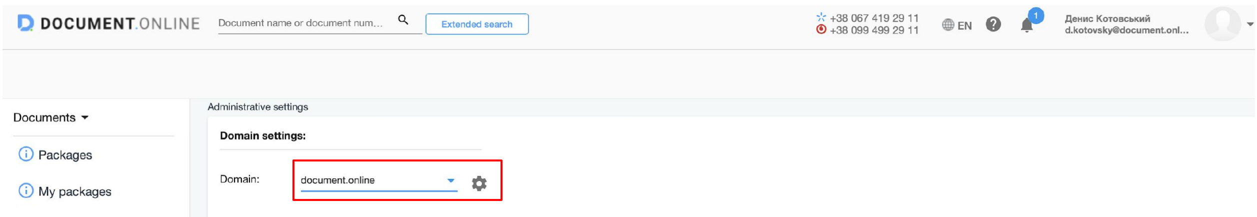
Confirmation of registration in the service by the domain administrator

On the portal, there is a function for administrator confirmation of user registrations working under a specific domain.

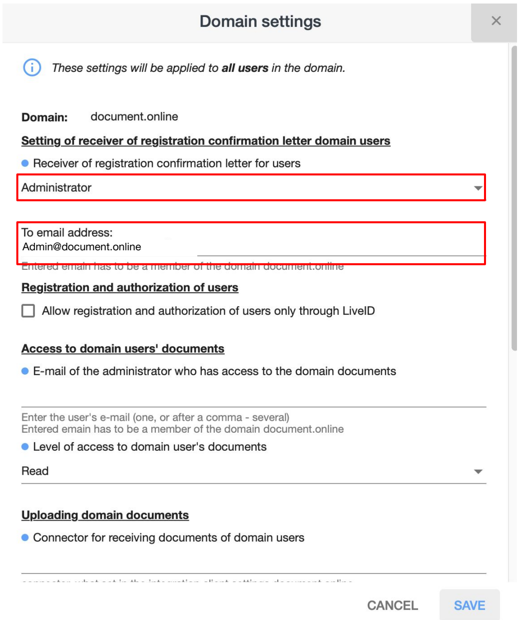
To access the administrator settings, click on the user icon and choose 'Administrative Settings' from the dropdown menu.



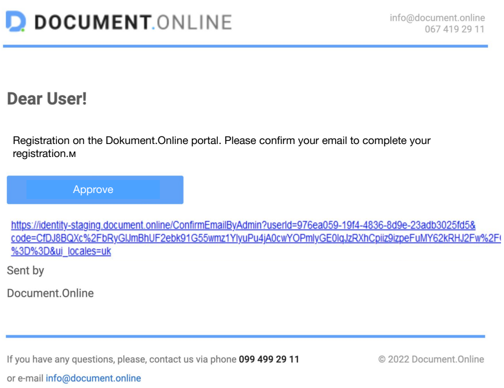
Click on the gear icon in the 'Domain Settings' section.



In the 'Registration Confirmation Email Recipient' section, choose 'Administrator' and enter the administrator's email below.



After completing the registration procedure:
The user who registered will receive an email to confirm their email address.



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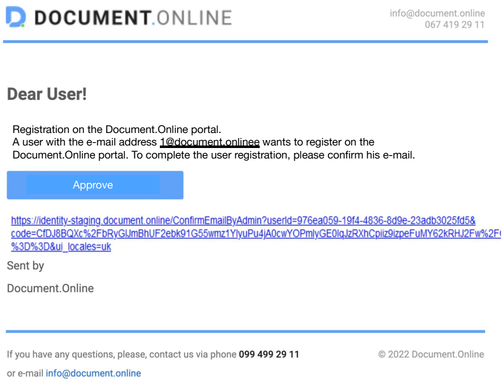
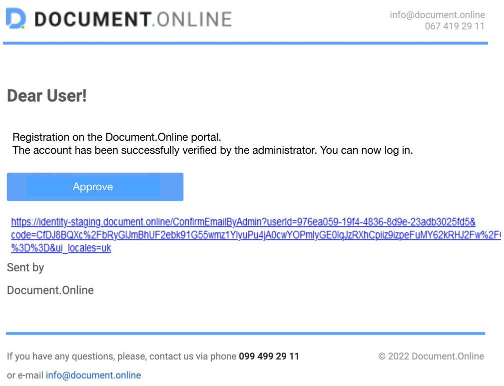
2. After the user confirms their email, the administrator will receive a confirmation registration email to their email address.

3. Once the administrator clicks on the 'Confirm' button, the user will be registered.



4. The user will receive a notification that the registration was successful, and they can log in to the system.



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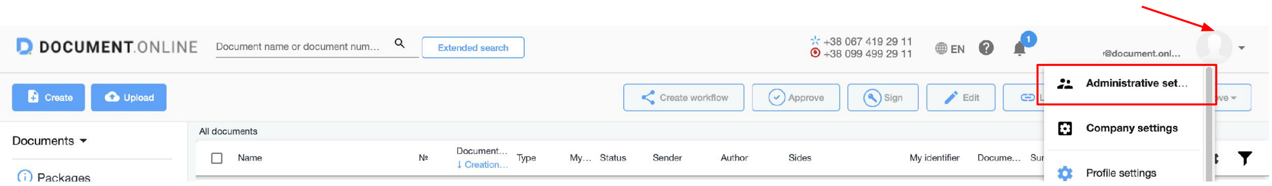
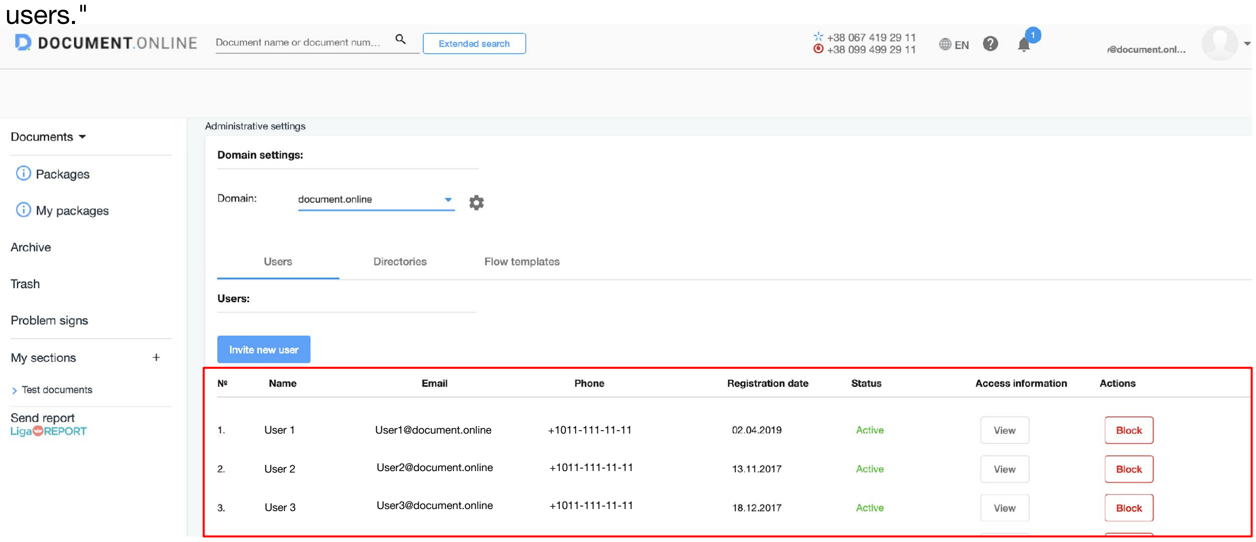
Control and blocking of user access to the system

The domain administrator has the ability to both confirm the registration of users for a specific domain and block them. The domain administrator can view all users registered under the company's domain.

To access the administrator settings, click on the user icon and choose 'Administrative Settings' from the dropdown menu.



Next to each user, there is a 'Block' button. If needed, the domain administrator can block specific users."



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