

TAWQEE e-Sign App

Commented [OS1]: Yellow - features Addition
Red - Remove features
Blue - Feature understanding

Login

1. Email/mobile
2. Password
3. Forgot password:
 - a. Reset password

Sign up

4. Basic details:
 - a. First name
 - b. Last name
 - c. Email
 - d. Mobile
 - e. Password
 - f. Organization name. (If the account is organization account)
 - g. Terms and conditions
5. Verify using email link or mobile OTP
6. Account gets activated
7. Business details
8. Pricing/Subscriptions (Monthly & Yearly):
 - a. Personal
 - b. Small org (up to 5 users)
 - c. Large org

Alerts

9. Notifications
10. Gallery access

Home

11. Header details?
12. Add document(s)
 - a. Add
 - i. Gallery
 - ii. Google Drive?
 - iii. OneDrive?

- iv. Others?
- b. Select / Add recipients
 - i. Sender (creator info)
 - ii. Recipients
 - 1. Import Bulk list
 - 2. Add from contacts
 - a. From phone
 - b. From already uploaded
 - 3. Add recipient
 - a. Name
 - b. Email
 - c. Permission
 - i. Needs to sign
 - ii. Receives a copy
 - iii. Needs to view
 - d. Access code (password protected)
- c. Prepare
 - i. Document uploaded preview
 - ii. Add fields (eg. sign, full name, stamp, initials)
 - iii. Formatting of added fields (font, size, etc..)
- d. Review and Send
 - i. Message to Recipients
 - 1. Email subject
 - 2. Message
 - 3. Set reminders (every 1/2/3/4/5/6/7 days)
 - ii. Summary
 - iii. Options
 - 1. Expiration
 - 2. Recipient privilege (Checkbox for allow other to sign behalf)

Account Manage

- 13. Inbox
 - a. List of received documents to sign
 - b. Search
 - c. Filters
 - i. Status
 - ii. Sent by
 - iii. Date
 - d. Actions
 - i. Sign
 - 1. Document preview
 - 2. Create signature (if not created)
 - a. Full name
 - b. Initials
 - c. Select style / Draw / Upload
 - 3. Actions
 - a. Finish
 - b. Other options

- i. Finish later
 - ii. Void
 - c. Download in PDF format
 - ii. Resend
 - iii. Move
 - iv. Copy
 - v. Void
 - vi. History
 - vii. Export to CSV
 - viii. Delete
- 14. Sent
 - a. List of sent documents to sign
 - b. Search
 - c. Filters
 - i. Status
 - ii. Date
 - iii. Sign
 - 1. Document preview
 - 2. Create signature (if not created)
 - a. Full name
 - b. Initials
 - c. Select style / Draw / Upload
 - 3. Actions
 - a. Finish
 - b. Other options
 - i. Finish later
 - ii. Void
 - c. Download in PDF format
 - iv. Resend
 - v. Move
 - vi. Copy
 - vii. Void
 - viii. History
 - ix. Export to CSV
 - x. Delete
- 15. Drafts
 - a. List of drafted documents
 - b. Search
 - c. Filters
 - i. Date
 - d. Actions
 - i. Contunie
- 16. Deleted
 - a. List of deleted documents
 - b. Search
 - c. Filters
 - i. Status
 - ii. Sent by
 - iii. Date
 - d. Actions
 - i. Restore

- ii. Continue
- 17. Bulk sends
 - a.
- 18. Quick views
 - a. Action required
 - b. Waiting for others
 - c. Expiring soon
 - d. Completed
 - e. Authentication failed

Templates

- 19. Templates
 - a. My templates
 - i. List of templates created by me
 - ii. Search
 - iii. Filters
 - iv. Actions
 - 1. Use template
 - a. Add recipients
 - b. Edit message to send
 - c. Summary and Other options
 - 2. Delete
 - b. Shared with me
 - i. List of templates shared with me
 - ii. Search
 - iii. Filters
 - iv. Actions
 - 1. Use template
 - a. Add recipients
 - b. Edit message to send
 - c. Summary and Other options
 - c. All templates
 - i. List of all templates
 - ii. Search
 - iii. Filters
 - iv. Actions
 - 1. Use template
 - a. Add recipients
 - b. Edit message to send
 - c. Summary and Other options
 - 2. Delete
 - d. Favorites
 - i. List of favourites templates
 - ii. Search
 - iii. Filters
 - iv. Actions
 - 1. Use template
 - a. Add recipients

- b. Edit message to send
 - c. Summary and Other options
 - 2. Delete
- e. Deleted
 - i. List of deleted templates
 - ii. Search
 - iii. Filters
 - iv. Actions
 - 1. Restore template

20. Create template

- a. Templates name and description
- b. Add documents
- c. Add recipients
 - i. Role, Name, Email, Permission, More options
 - ii. Import contacts
 - iii. Add from contacts
- d. Message to all participants
 - i. Email subject
 - ii. Email message
 - iii. Advance options
 - 1. Edit
 - 2. View
- e. Document preview
 - i. Document uploaded preview
 - ii. Add fields (eg. sign, full name, stamp, initials)
 - iii. Formatting of added fields (font, size, etc..)
 - iv. Actions
 - 1. Recipient preview
 - 2. Save and Close
 - 3. Other actions

21. Create e-stamp

- a. Full name
- b. Designation
- c. Company name

22. Create signature

- a. Full name
- b. Initials
- c. Select signature type
 - i. Choose from options
 - ii. Draw
 - iii. Upload

Reports (Did not have access to this tab in docuSign)

- 23. Overview
- 24. Recipients

- a. Activity reports
- 25. Usage
 - a. User report
 - b. Group report
 - c. Account report
 - d. Template report
- 26. Downloads

Settings

- 27. Account settings
 - a. Plan and billing
 - i. Usage
 - 1. Document usage
 - ii. Account details
 - 1. Close account
 - iii. View plans
 - b. Account profile
 - i. Account name
 - ii. Admin custom message
 - iii. Custom help contact
 - iv. Account address
 - c. Security settings
 - i. Account security
 - ii. Authentication settings
 - iii. Password security
 - d. Updates
 - i. Scheduled release
 - ii. System updates
- 28. Sign in and Sending
 - a. Sign in settings
 - i. Signing experience
 - ii. Recipients
 - iii. Delegation
 - iv. Document formatting
 - v. Envelope delivery
 - b. Sending settings
 - i. Fields and properties
 - ii. Recipients roles
 - iii. Templates
 - 1. Unable template upload
 - c. Document Retentions
 - i. Document retention policy
 - ii. Targeted purge
 - d. Reminders and Expiration
 - i. Reminders and expiration

Profile

- 29. My profile
 - a. Profile image
 - b. Name
 - c. Email
 - d. Contact information
 - e. Organization Details(Name, stamp)
- 30. Privacy and security
- 31. Signatures
 - a. List of all signature
 - b. Actions
 - i. Add new signature
 - ii. Delete
 - iii. Edit
- 32. Stamps
 - a. List of all stamps
 - b. Actions
 - i. Add new stamp
 - ii. Delete
 - iii. Edit
- 33. Language and region
 - a. Language
 - i. Action
 - 1. Update
 - b. Regional settings
 - i. Action
 - 1. Update