



Electronic Signature (Capture Live Image)

User Manual



Introduction



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Revision History 1

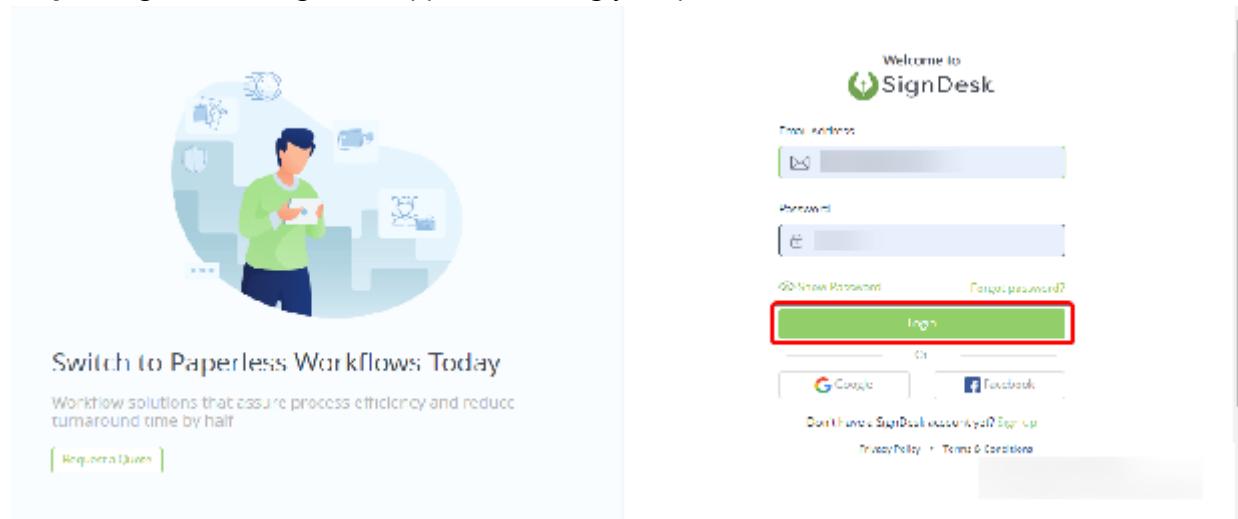
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Scope of the document

This user manual offers comprehensive guidance for initiating and completing workflows within the SignDesk portal. It outlines the process of selecting an electronic signature and incorporating digital stamping. Additionally, it provides detailed instructions to capture the user's live image.

Initiator Journey

Step 1: Log in to the SignDesk application using your provided credentials.



Step 2: You are redirected to the SignDesk dashboard. Select the **Workflow** module on the side panel and go to the **Workflow Dashboard** tab then click on the **New Document** button (Dropdown symbol) present on the top right corner of the screen. A drop-down appears. Select either one of the options based on the requirement.

- Individual Workflow
- Multiple Workflows

In this case, click on the **Individual workflow** option.

The screenshot shows the SignDesk Workflow Dashboard. On the left sidebar, the 'Workflow' icon is highlighted with a red box and a red arrow pointing to it. At the top, there are tabs: 'Workflow Dashboard' (highlighted with a red box and a red arrow), 'Multiple Electronic Signature', 'Full Workflow Dashboard', and 'Auto Sign'. In the center, there is a table listing documents. The first document is 'Document Name 1' (Status: Completed, Due Date: 12th Aug 2024). The second document is 'Document Name 2' (Status: Completed, Due Date: 12th Aug 2024). The third document is 'Document Name 3' (Status: Under Signature, Due Date: 8th Feb 2025). The fourth document is 'Document Name 4' (Status: Under Signature, Due Date: 8th Feb 2025). At the top right, there are buttons for 'New Document' (green) and 'Individual workflow' (red). Below these buttons, there is a search bar and a page navigation area showing '1 / 10 of 39'.

Step 3: You have two options for document creation:

- Upload your files (Upload existing files from your local storage).
- Choose from templates (Use SignDesk's standardized templates).

Go to the **Upload your files** option and upload the document either by using the **Drag & Drop** or clicking the **Browse** button.

The screenshot shows the 'Upload your files' interface. It features a large green dashed box labeled 'Upload your files'. Inside this box is a 'Drag & Drop UI' button with a file icon and a 'Browse' button. Below this, there is a message: 'Supported file types: PDF files - Max size - 10 MB'. Below the upload area, there is a section titled 'Choose from templates' with a dropdown menu set to 'All templates' and a search bar. At the bottom, there are four circular icons: 'sample template', 'placebox', 'Meeting Notes', and 'answer'. The 'sample template' icon is highlighted with a red box and a red arrow.

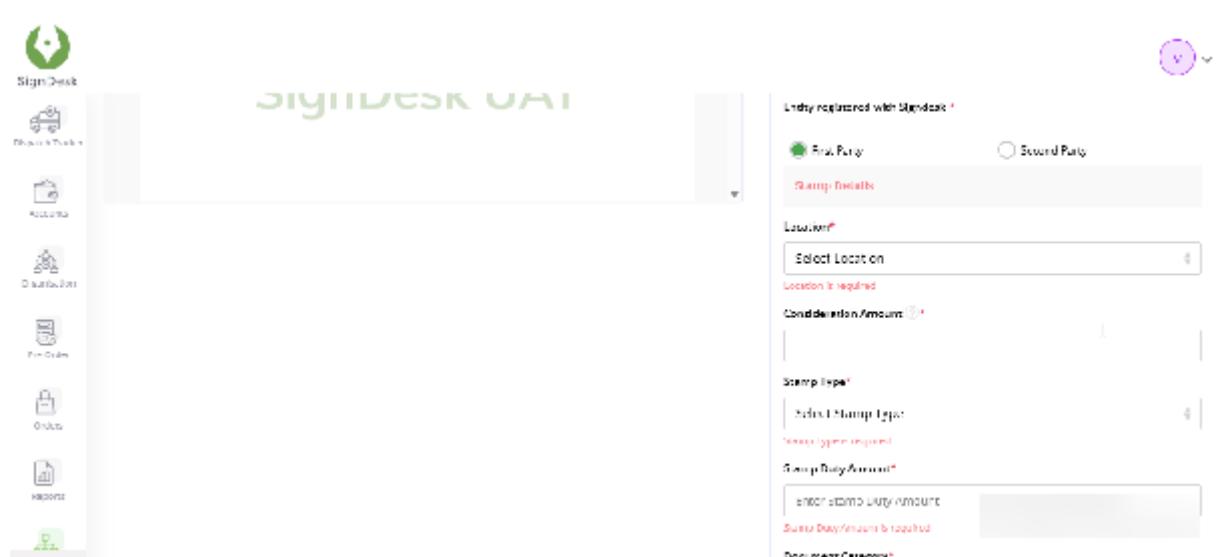
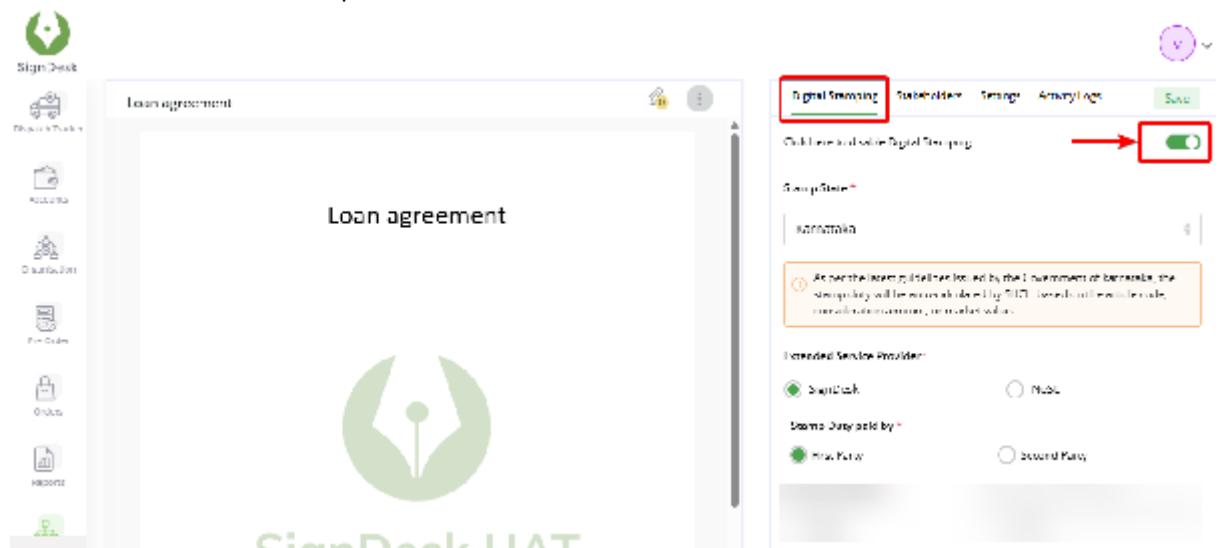
Step 4: Once the document is uploaded, select the **Document Title** from the dropdown. Addition of a description is optional. Click on the **Next** button to proceed.

Note: You can re-upload the document by clicking on the **Re-upload** button.

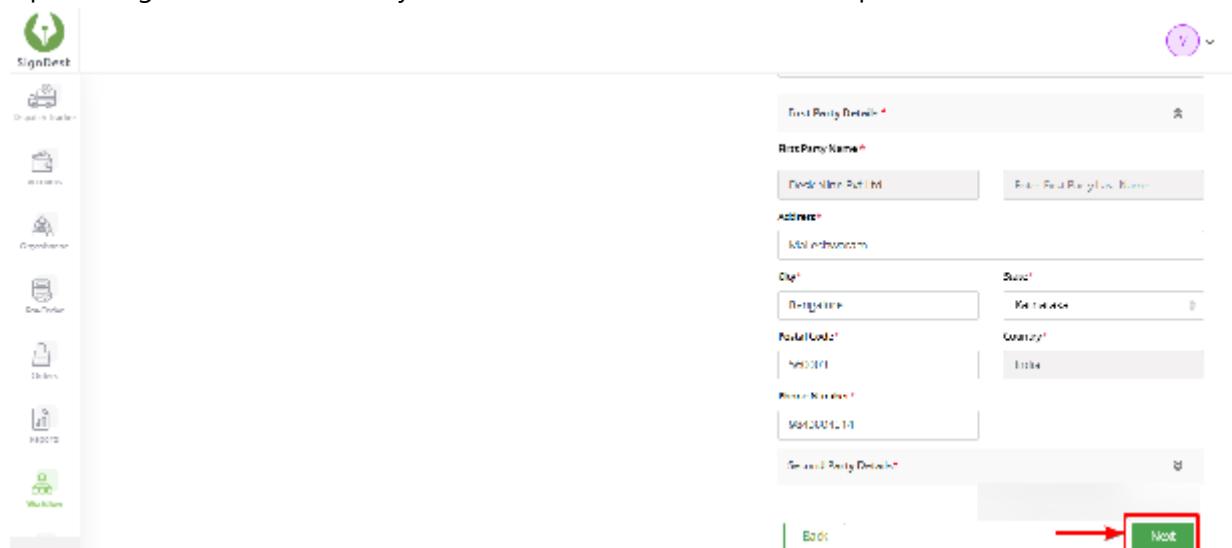


Step 5: In the Digital Stamping section, you can enable the toggle button to add the stamping services to the workflow (if stamping is necessary). After enabling the toggle button, fill in the necessary **Stamp Details** along with the **Stamp State**, **Extended Service Provider**, and **Stamp Duty paid by** fields based on your requirement.

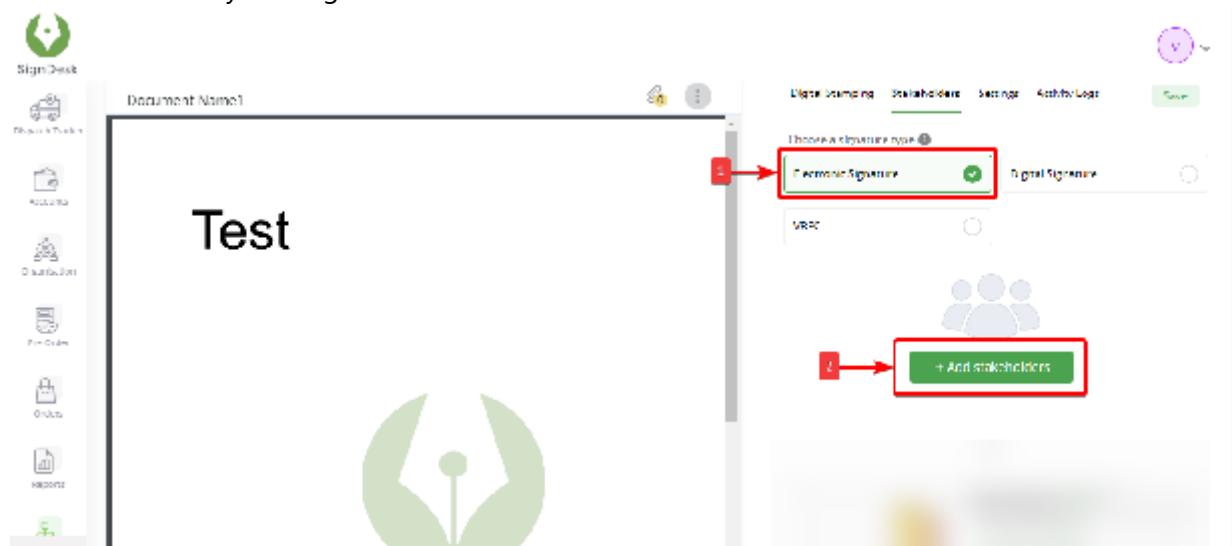
Continue to fill in the Stamp Details.



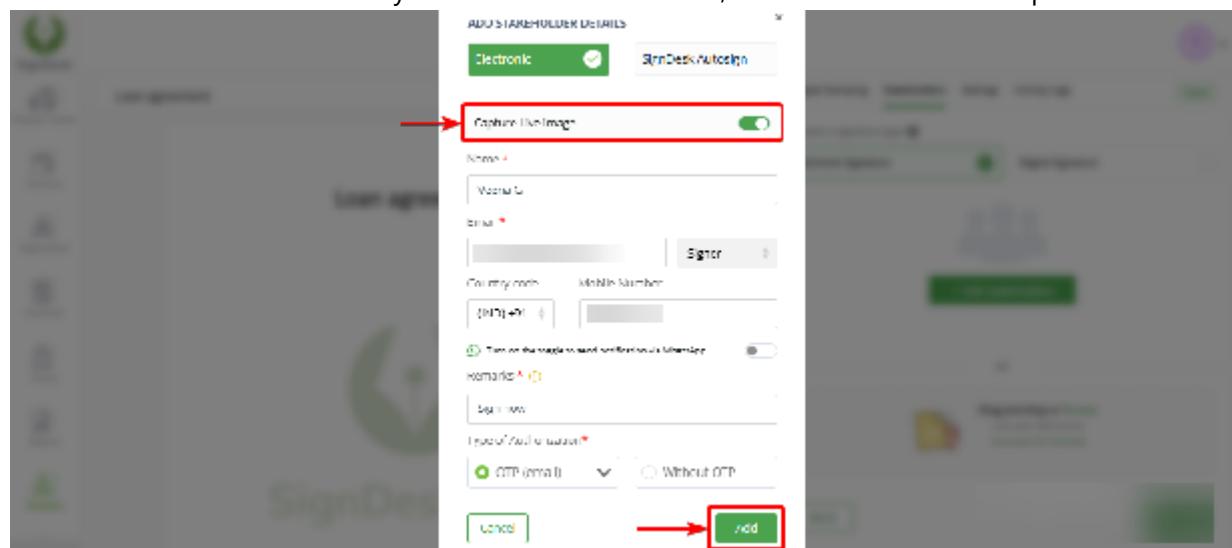
Upon filling the all the necessary details, click on the **Next** button to proceed.



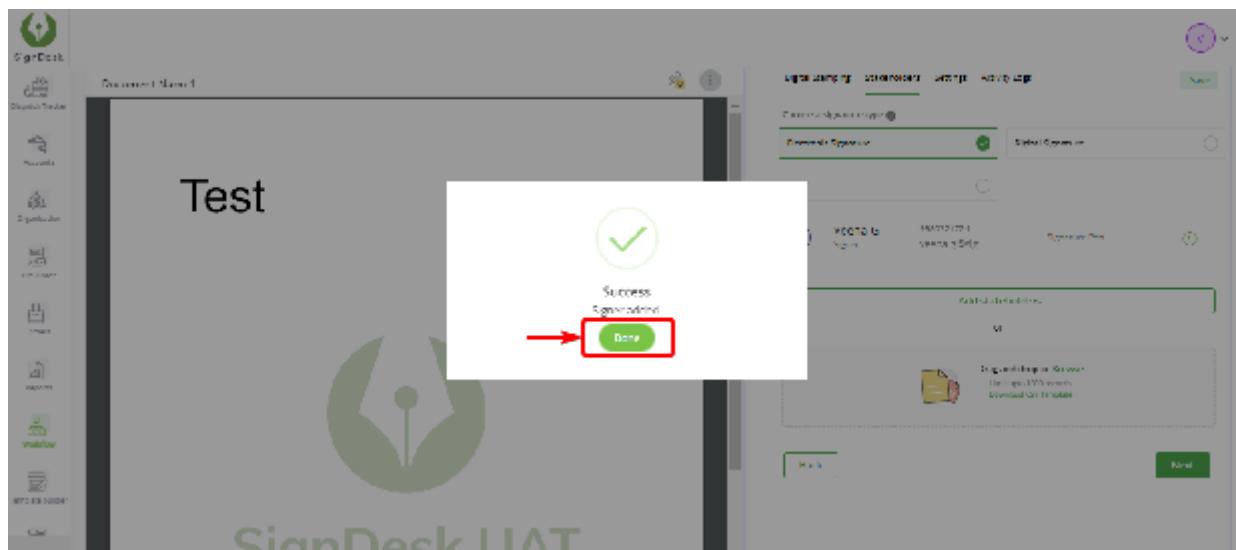
Step 6: Select the signature type (Electronic signature) based on the requirement, and then proceed to add the stakeholder by clicking the **+Add Stakeholder** button.



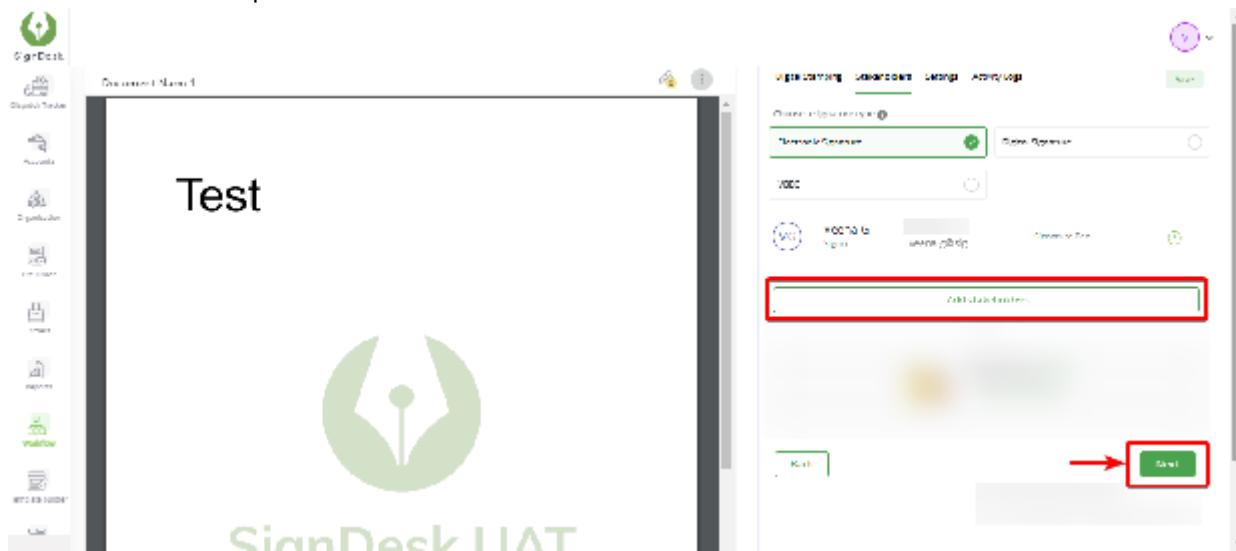
Step 7: Select **Electronic** as the signature mode and enable the toggle to capture a live image of the stakeholder. Fill in the necessary stakeholder details. Then, click the **Add** button to proceed.



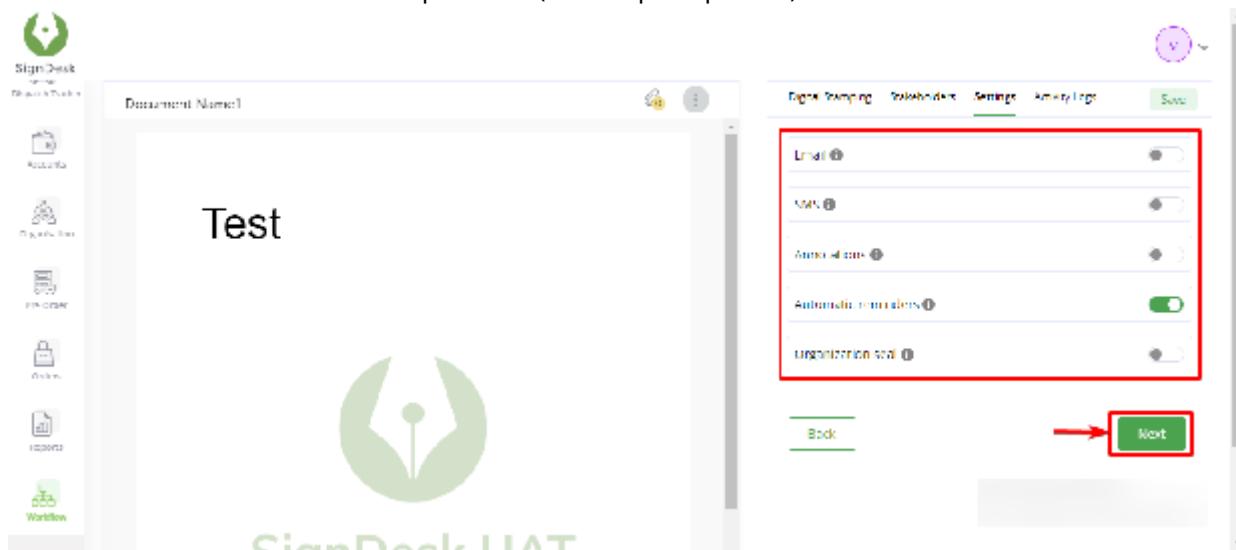
Step 8: A pop-up appears depicting the successful addition of the signer. Click on the **Done** button to proceed.



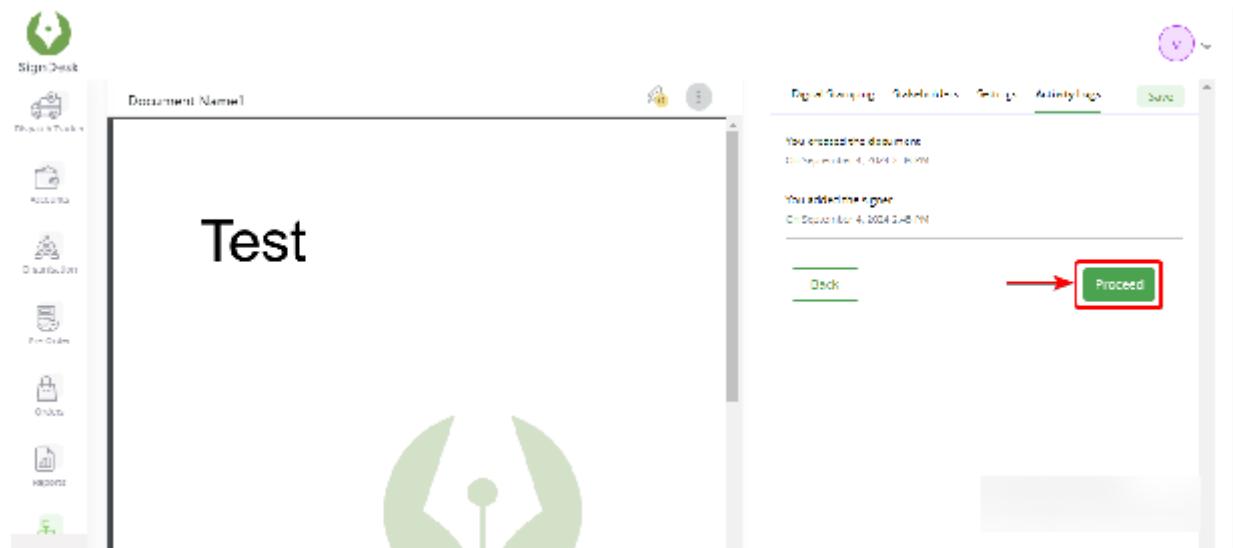
You can add multiple signers by clicking on the **+Add Stakeholders** button if necessary. Otherwise, click on the **Next** button to proceed.



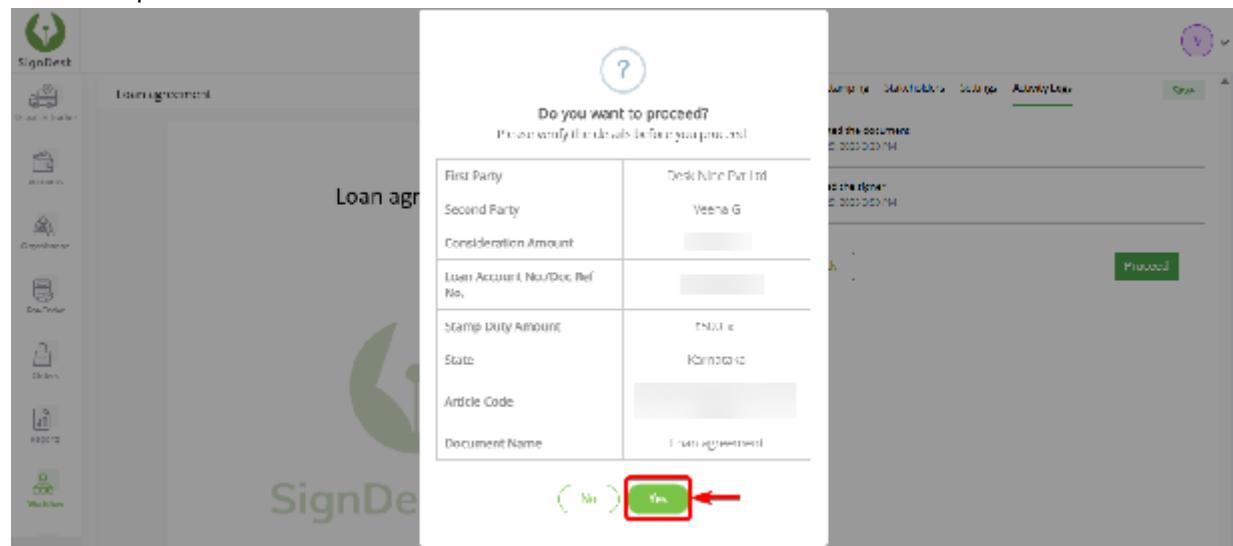
Step 9: In the settings section, you can fill in the details if necessary by enabling the corresponding toggles. Then click on the **Next** button to proceed. (This step is optional) .



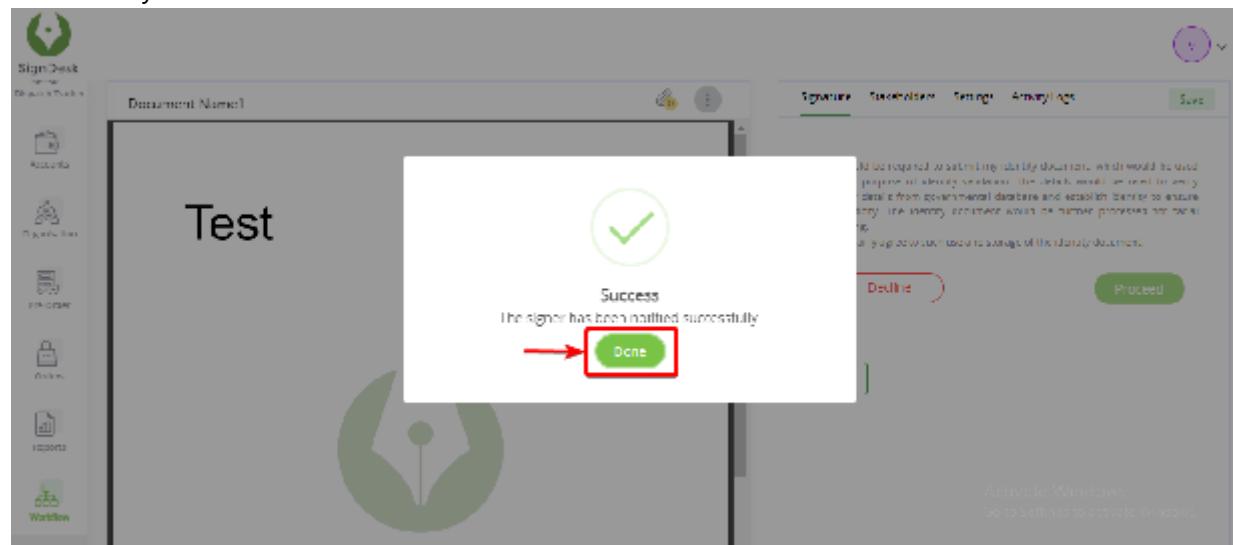
Step 10: The summary of the document's progress can be viewed under the activity logs tab. Next, click on the **Proceed** button.



Step 11: A pop-up appears requesting confirmation to verify the details before proceeding. Click on the **Yes** button to proceed.

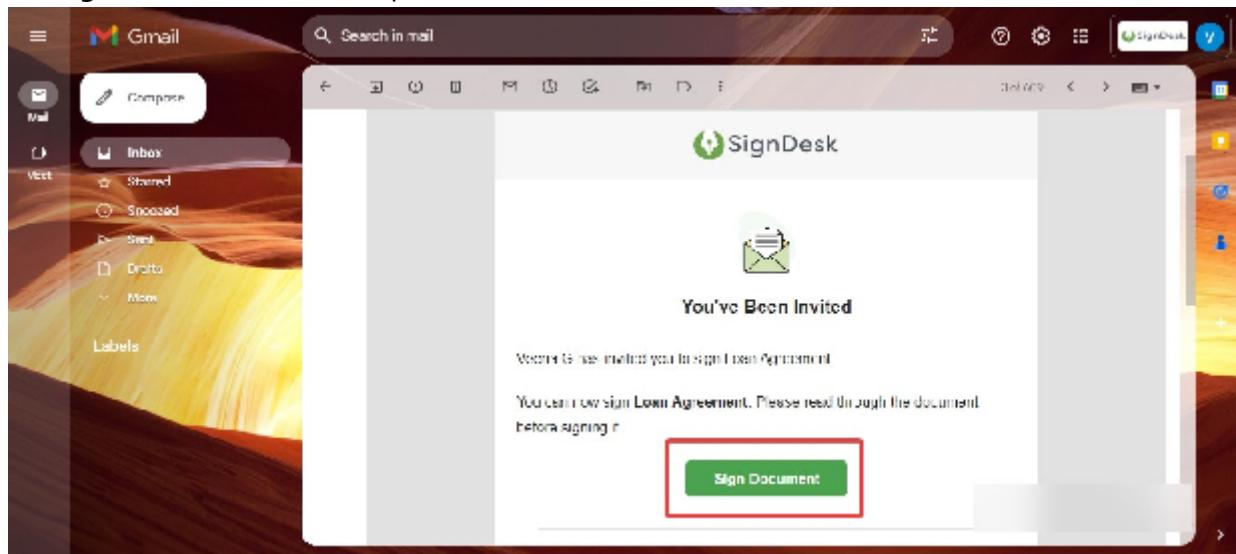


Step 12: The stamp paper will be attached and a pop-up appears, depicting that the signer has been notified successfully.

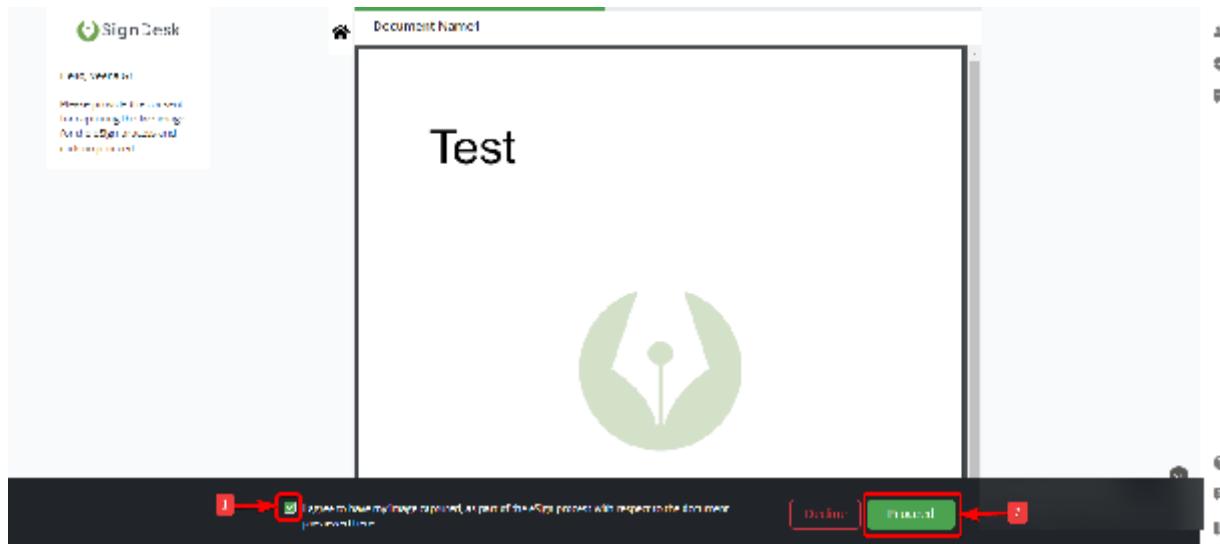


Signer Journey

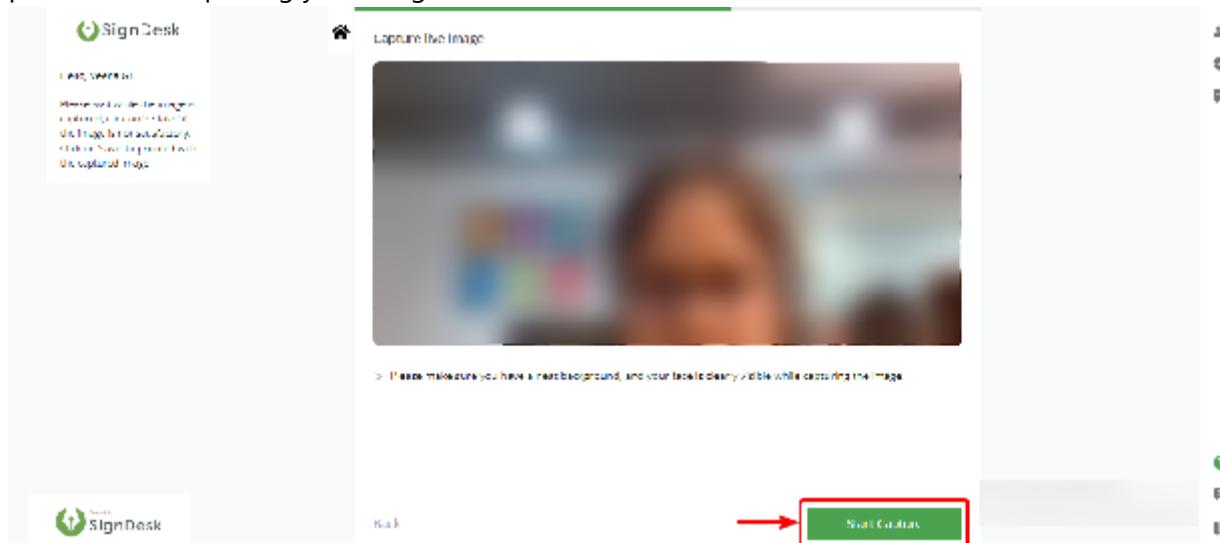
Step 1: An email with an invitation to sign the document is sent to your respective email addresses. Click on the **Sign Document** button to proceed.



Step 2: You are redirected to the SignDesk portal, where the preview of the document is displayed. Check the **consent checkbox** and then click on the **Proceed** button to continue.

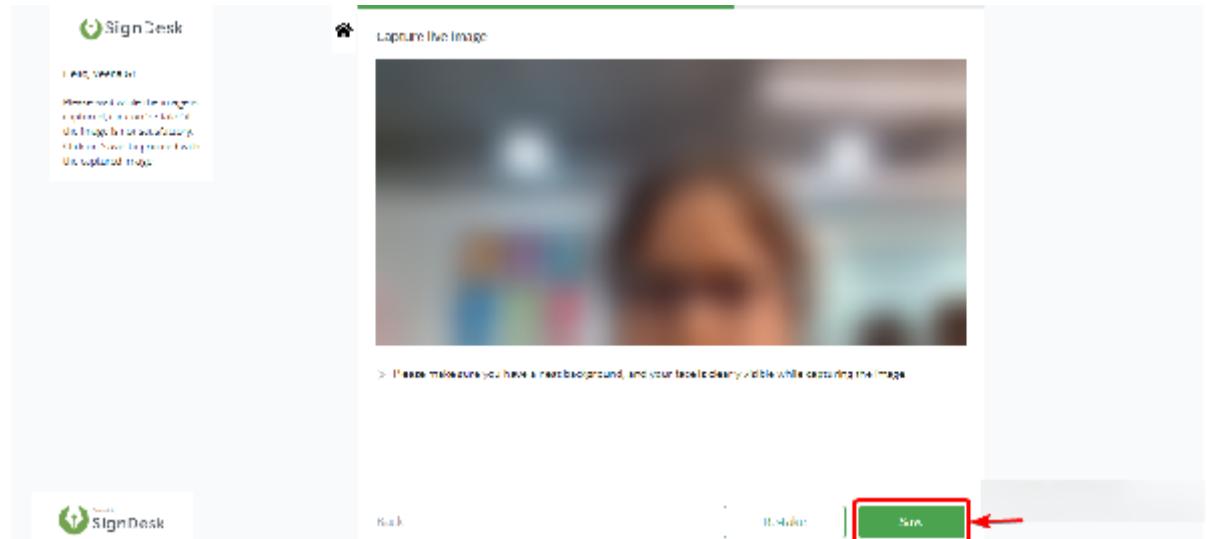


Step 3: A screen appears where you have to capture your live image. Click on the **Start Capture** button to proceed with capturing your image.

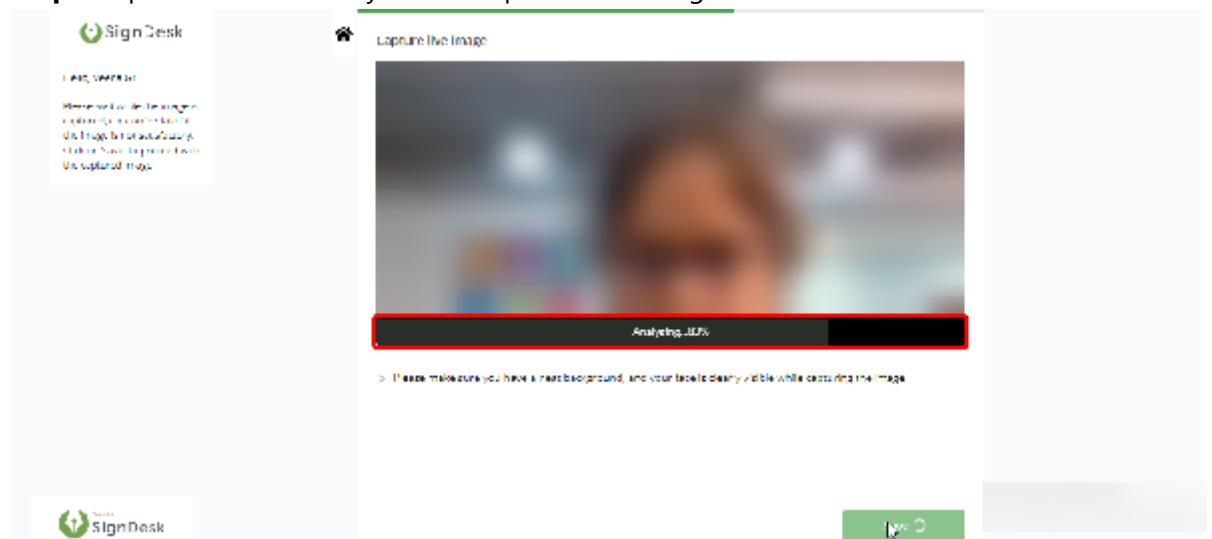


Step 4: Upon capturing your image, click on the **Save** button to save the captured image.

Note: You can use the **Re-take** button to capture your image again if necessary.



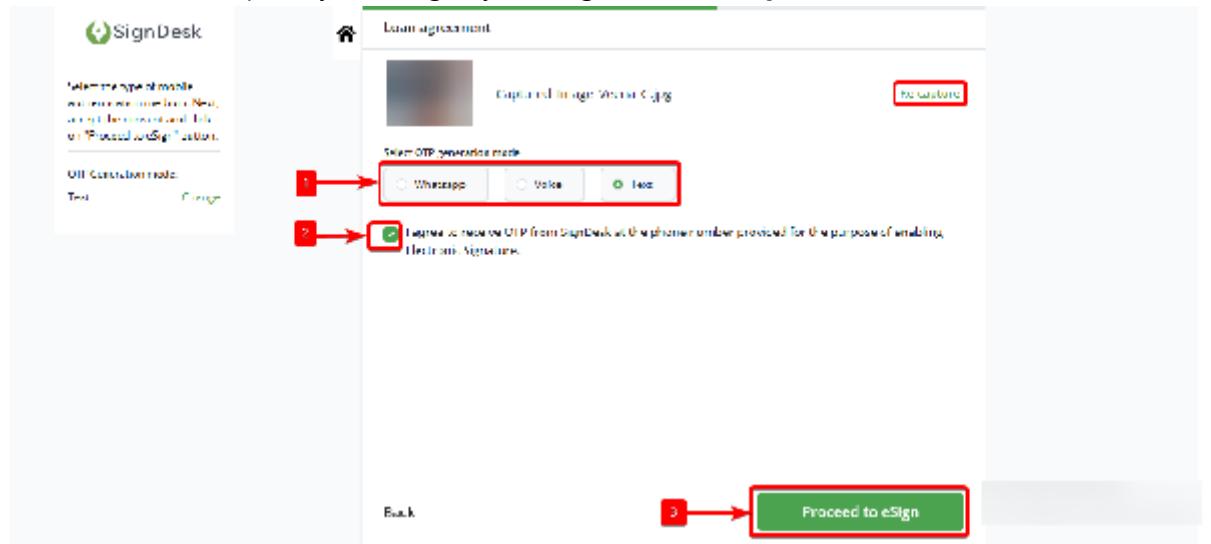
Step 5: Upon successful analysis. The captured live image will be saved.



Note: If you have the "Liveliness Check" feature enabled, the system will record a 3-second video to verify that the image belongs to a live person. You will only be able to proceed to the next step if you pass this check. If you fail, you will be prompted to try again.

Step 6: You have to select the OTP generation mode. In this case, select **Text**, check the consent checkbox, and then click on the **Proceed to eSign** button to proceed.

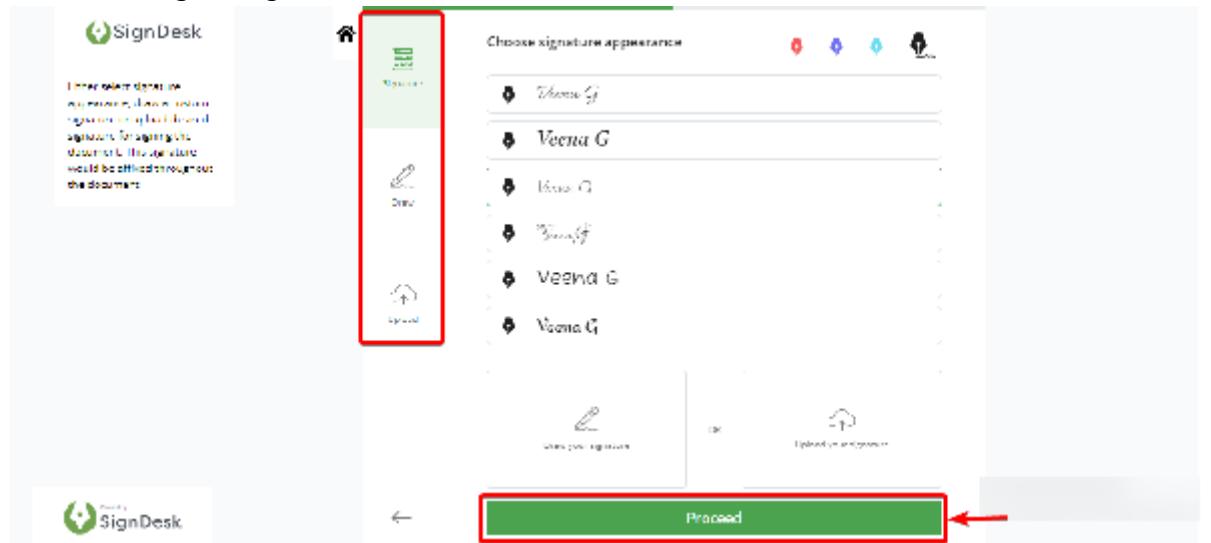
Note: You can recapture your image by clicking on the **Re-capture** button.



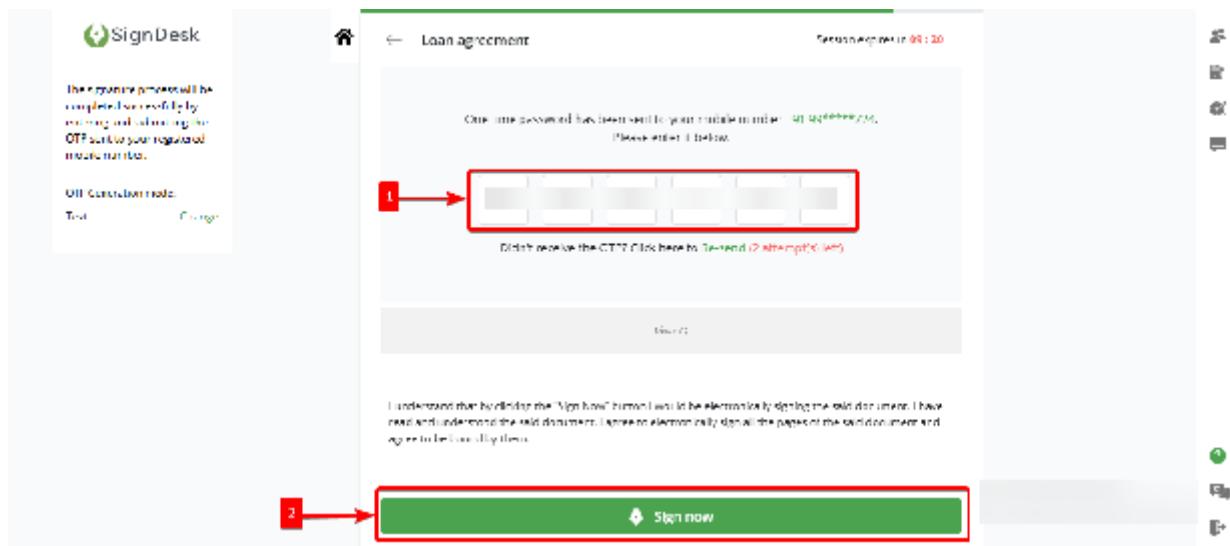
Step 7: Select one from the provided options to choose the signature for the document:

- Signature (Available signature appearances)
- Draw (Draw a custom signature)
- Upload (Upload the desired signature from your local storage)

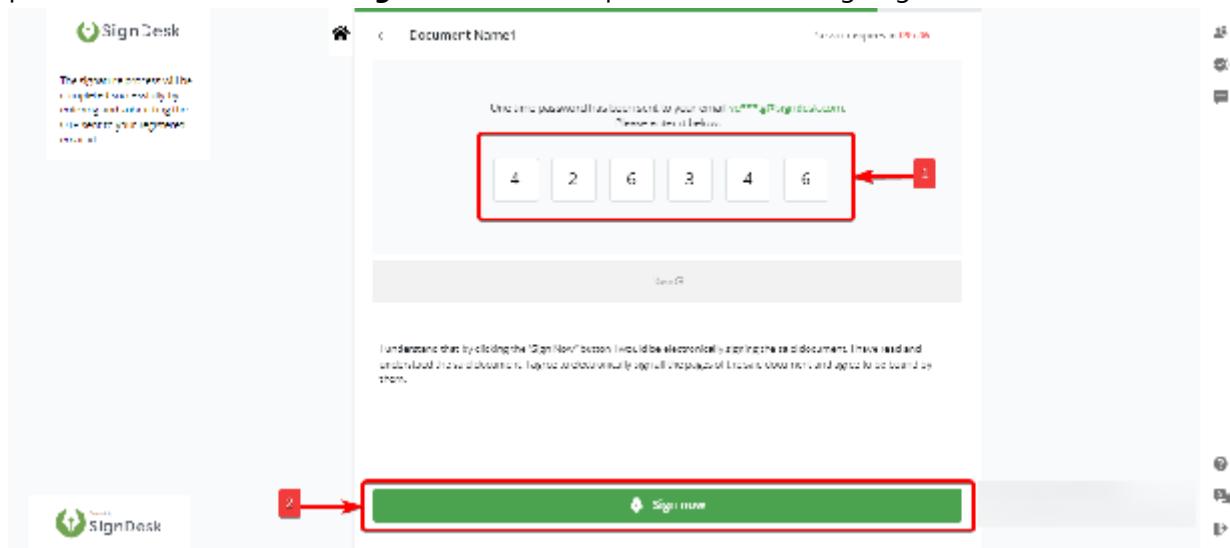
After choosing the signature for the document, click on the **Proceed** button.



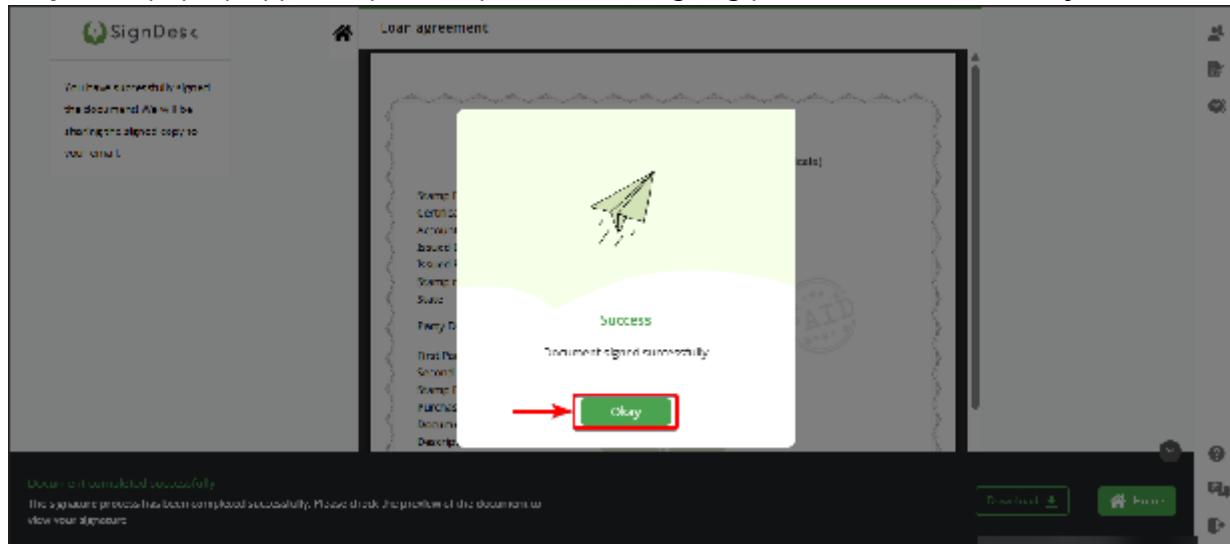
Step 8: Enter the OTP sent to your mobile number in the provided field and click the **Sign now** button to proceed.



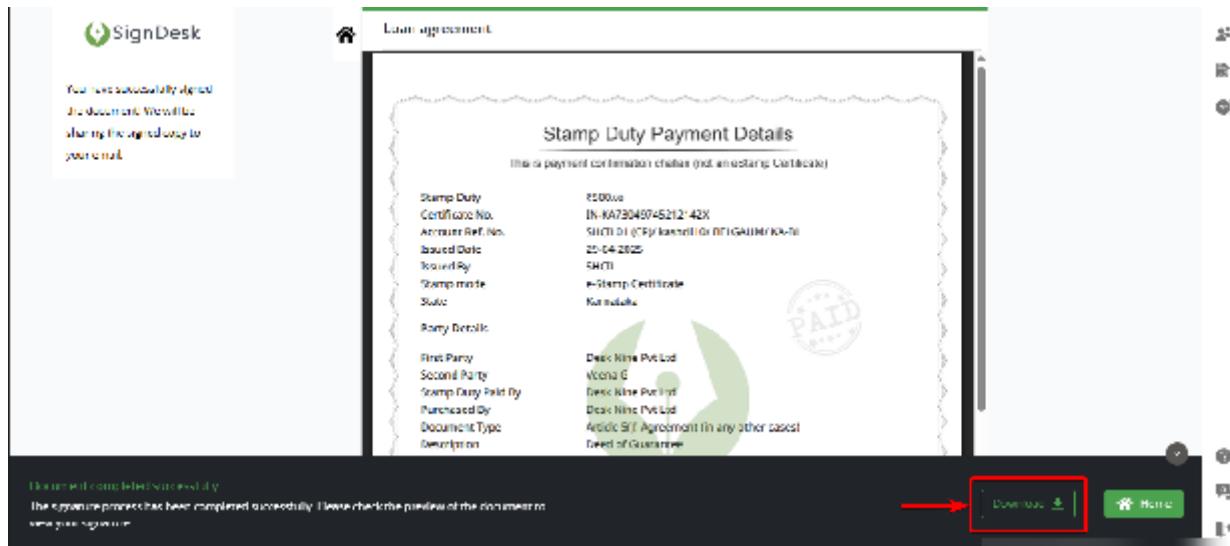
Step 9: The OTP is sent to the email or mobile number selected by the initiator. Enter the received OTP in the provided field and click the **Sign now** button to proceed with the signing.



Step 10: A pop-up appears upon completion of the signing process. Click on the **Okay** button.



Step 11: Upon the signature is affixed to the document. You can download the completed document by clicking on the **Download** button.



The completed document and the audit document are sent to your email address.

