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### **DISSEMINATION AND TRACKING OF DOCUMENTS WITH DOWNSTREAM CONTROL**

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#### **Abstract**

Disclosed herein are system, method, and computer program product embodiments for managing the dissemination of documents using downstream control. A document linking system may facilitate the creation of a document link, graphical document link, and/or a corresponding document token. This link may be distributed downstream via messages, emails, or other applications. The document linking system may track document interactions, trace locations, and/or control individualized downstream access. The document linking system may provide instructions to a document delivery system to integrate a plugin or widget into its corresponding application (e.g., a messaging or email application). A user using the application may select a GUI object to access the document linking system and generate a document link. This link may then be embedded into a message or email and disseminated. The document linking system may also generate graphical document links that may be scanned with a camera to access the document.

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## **Background/Summary**

### **CROSS-REFERENCE TO RELATED APPLICATIONS**

[0001] This application claims the benefit and priority to U.S. Non-Provisional patent application Ser. No. 17/352,568, filed Jun. 21, 2021, entitled “DISSEMINATION AND TRACKING OF DOCUMENTS WITH DOWNSTREAM CONTROL,” which is incorporated herein by reference in its entirety.

### **BACKGROUND**

#### **Field**

[0002] This field is generally related to document linking, modification, tracking, tracing and dissemination and their applications to create, deliver, track, trace and disseminate documents.

#### **Related Art**

[0003] As individuals, businesses, and governments interact, parties often exchange many documents to communicate, or transfer files and records from one party to another, or from one system to another. These documents may include informational documents for acknowledgement or may be contractual obligations. As documents are disseminated, however, the continued spread of the documents may become difficult to manage. For example, tracking viewership of the document and/or modifications to the document may be uncontrollable. This may become difficult when there are multiple parties viewing or modifying the document. For example, a document owner may send a document to an intended recipient, but the intended recipient may further forward that document to another individual. In this case, the document owner may be unable to control or track the continued distribution of the document beyond the party originally intended to receive the document. Encrypting and preserving a true record of views or modifications may also be difficult when using unsecure technology such as electronic mail or social media posting.

### **BRIEF SUMMARY**

[0004] Disclosed herein are system, apparatus, device, method and/or computer program product embodiments, and/or combinations and sub-combinations thereof, for managing the dissemination of documents using downstream control.

[0005] The embodiments disclosed herein may provide a plugin or widget which may be integrated into a document delivery system such as an email system, a business application, a social media channel, a website, and/or a chat or messaging system. By using the plugin or widget, a user accessing the document delivery system may use a front-end user interface for providing a document to a back-end system for managing documents. The front-end interface may be accessed via a plugin or widget integrated into an application managed by a document delivery system. For example, the application may be a messaging application managed by a messaging system. By integrating the plugin or widget into various document delivery systems, users using those document delivery systems may gain access to the back-end management of documents. This back-end system may allow a user to manage document creation, document uploads, document permissions, document modifications from different parties, and/or view a document flow tracking the dissemination of the document. Based on this flow, a document owner may modify and/or

adjust permissions corresponding to the document.

[0006] The back-end system may be a document linking system that generates and/or manages document links. In some embodiments, the document linking system may also use a document token process. As will be further explained below, document tokens may be used to represent ownership and/or permissions corresponding to a document. In some embodiments, a document token may be a non-fungible token (NFT). The document linking system may receive an uploaded document and/or aid the user in generating a document for dissemination. Upon receiving or generating a document, the document linking system may generate a document token corresponding to the document. As will be further described below, the document token may be a hash of the document and/or may be used to track document modifications, acknowledgments, and/or permissions. Upon generating the document token, document linking system may transmit the document tokens as links to document delivery systems. The document delivery systems may then embed the document links into messages for a user to transmit. This may allow users to disseminate documents managed by the document linking system.

[0007] An intended recipient may then receive the document link via a document delivery system corresponding to the intended recipient. Upon accessing the link, the user may supply credentials to the document linking system. In some embodiments, the document delivery system implementing the plugin from the document linking system may implement a single sign-on process to provide credentials to the document linking system. The document linking system may track or log the access to the document based on the document link. This tracking may be performed using a document flow data structure. The document owner may view this document flow data structure to identify downstream individuals accessing the document and/or to manage permissions for these downstream individuals. In this manner, the document owner may view and/or manage downstream permissions even if a document link is distributed beyond an initial intended recipient. In some embodiments, the document flow data structure may also track document participants and/or events such as creation, viewing, signing, sharing or downloading. The document flow data structure may also track times, dates, and/or locations like the latitude and longitude of digitally transmitted information. For example, the document flow data structure may track global positioning coordinates related to a document and/or a document interaction event.

[0008] The document linking system may track access and/or modifications of the document. In some embodiments, the modifications may be to the text of the document. In some embodiments, the modifications may be an acknowledgement and/or a signature corresponding to the document. For example, the acknowledgement may acknowledge receipt of the document. In this manner, dissemination may occur to downstream users while keeping a record of users accessing and/or modifying the document. Integrating this process with existing document delivery systems may also provide a more streamlined process for managing, sharing, and/or modifying documents.

[0009] In some embodiments, the document linking system may manage documents in a database and generate links to database addresses. In some embodiments, the database may be a blockchain and the document linking system may manage documents using document tokens via a blockchain. The document tokens may correspond to generated documents and/or modifications of documents. The document tokens may be used with the blockchain to provide proof of a document creation or modification. For example, on either a public or private blockchain, new documents and/or modifications may be tracked as updated blocks and/or code executed on a blockchain using smart contract functions.

[0010] The publication to a blockchain may provide security and trust that modifications are immutable. Further, distributed ledger technology may provide a streamlined manner of tracking documents and/or modifications and presenting these documents to parties communicating and/or editing a document. As will be further described below, the embodiments described herein further provide faster and more efficient back-end processing for blockchain operations. In particular, the use of asynchronous calls to the blockchain may provide increased speed and may avoid delays

related to blockchain transaction times.

[0011] The immutability of the blockchain may preserve documents and/or modifications to documents. Further, utilizing encryption may maintain confidentiality of sensitive information when disseminating documents. This may be useful for when a document is a contract. By managing these documents using a blockchain, parties to a contract may present offers and counteroffers that may be relied upon by other parties in a more trusted manner. For documents, the document linking system may streamline a document deliver in a manner that preserves confidentiality while maintaining a high degree of trust. Parties using the document linking system may provide digital signatures or acknowledgments as interactions with received documents. In this manner, the document linking system may facilitate the signing of a document. In some embodiments, the document generation and/or dissemination may be performed in a decentralized manner and/or may provide a decentralized document file system.

[0012] The plugin, widget, and/or graphical user interface may be implemented into document delivery systems to streamline the document generation, document delivery, and document dissemination process. The plugin may allow a user to quickly generate a document using fewer GUI interactions. The reduction of interactions may aid in reducing wasted computational resources or unnecessary web navigation. Further, the plugin may aid in reducing network traffic due to the reduced number of interactions. Similarly, the document upload and/or creation process while delivering document links may deliver documents in a similar and compact manner. Users accessing the link may access and/or interact with various documents via a number of different document delivery systems. In this manner, the document linking system may also reduce the number of user interactions and computational transactions while also reducing network traffic.

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## Description

### BRIEF DESCRIPTION OF THE DRAWINGS

[0013] The accompanying drawings are incorporated herein and form a part of the specification.

[0014] FIG. 1A depicts a block diagram of a document management environment, according to some embodiments.

[0015] FIG. 1B depicts a block diagram of a document management environment with downstream dissemination, according to some embodiments.

[0016] FIG. 1C depicts a block diagram of a document management environment with document collaboration, according to some embodiments.

[0017] FIG. 1D depicts a block diagram of a document management environment with permission control, according to some embodiments.

[0018] FIG. 2 depicts a flowchart illustrating a method for generating a document token, according to some embodiments.

[0019] FIG. 3A depicts a flowchart illustrating a method for tracking document access via a document token, according to some embodiments.

[0020] FIG. 3B depicts a flowchart illustrating a method for managing document permissions, according to some embodiments.

[0021] FIG. 4 depicts a flowchart illustrating a method for modifying a document, according to some embodiments.

[0022] FIG. 5A depicts a block diagram of a graphical user interface including a document token generation plugin, according to some embodiments.

[0023] FIG. 5B depicts a block diagram of a graphical user interface including a document token generation plugin in a toolbar, according to some embodiments.

[0024] FIG. 6 depicts a block diagram of a graphical user interface for creating a document token, according to some embodiments.

[0025] FIG. 7 depicts a block diagram of a graphical user interface displaying a message including a document link, according to some embodiments.

[0026] FIG. 8 depicts a block diagram of a graphical user interface for signing into a document linking system, according to some embodiments

[0027] FIG. 9A depicts a block diagram of a graphical user interface displaying a document corresponding to a document link, according to some embodiments.

[0028] FIG. 9B depicts a block diagram of a graphical user interface displaying a menu overlaying the document, according to some embodiments.

[0029] FIG. 10 depicts a block diagram of a graphical user interface displaying a document flow, according to some embodiments.

[0030] FIG. 11A depicts a block diagram of a graphical user interface displaying documents corresponding to a user, according to some embodiments.

[0031] FIG. 11B depicts a block diagram of a graphical user interface displaying a menu overlaying the documents corresponding to the user, according to some embodiments.

[0032] FIG. 12 depicts a block diagram of a graphical user interface for sharing a document to different users, according to some embodiments.

[0033] FIG. 13 depicts a block diagram of a graphical user interface for adding a new user for sharing a document, according to some embodiments.

[0034] FIG. 14 depicts a block diagram of a graphical user interface with a graphical document link, according to some embodiments.

[0035] FIG. 15 depicts a flowchart illustrating a method for generating a graphical document link, according to some embodiments.

[0036] FIG. 16 depicts an example computer system useful for implementing various embodiments.

[0037] In the drawings, like reference numbers generally indicate identical or similar elements. Additionally, generally, the left-most digit(s) of a reference number identifies the drawing in which the reference number first appears.

#### DETAILED DESCRIPTION

[0038] Provided herein are system, apparatus, device, method and/or computer program product embodiments, and/or combinations and sub-combinations thereof, for managing the dissemination of documents using downstream control.

[0039] Various embodiments of these features will now be discussed with respect to the corresponding figures.

[0040] FIG. 1A depicts a block diagram of a document management environment **100A**, according to some embodiments. Document management environment **100A** may include document linking system **110**, database **120**, document delivery systems **130**, and/or user devices **140**. Document linking system **110** may include one or more servers and/or databases **120** that may communicate with document delivery systems **130A** to **130C**. Document delivery systems **130** may be servers and/or databases providing messaging platforms for user devices **140**. For example, document delivery systems **130** may be email providers, social media providers, text message or SMS providers, blogs, and/or other systems that facilitate the delivery and/or receipt of messages for user devices **140**. User device **140** may be a computer, laptop, tablet, phone, and/or other device that may access the Internet and/or access a document delivery system **130**.

[0041] As will be further described below, document linking system **110** may provide software instructions, executable code, a software as a service (SaaS), and/or other programming to the document delivery systems **130** to provide a plugin or widget to be displayed on a graphical user interface. This plugin or widget may be integrated into a messaging service provided by a document delivery system **130**. A user using a user device **140** may select this plugin or widget to access the document link and/or token generation managed by document linking system **110**. User device **140** may provide a document to document linking system **110** via the plugin or widget.

Document linking system **110** may generate document links and/or tokens based on documents received from or created by user devices **140**. In some embodiments, document linking system **110** may preserve the document tokens using database **120**. In some embodiments, database **120** may be a blockchain. After generating a document link and/or token, document linking system **110** may provide the document link and/or token to a document delivery system **130**. This link may be embedded into a message being drafted by a user device **140**. A document delivery system **130A** may then provide the message including the document link to another document delivery system **130B** to provide access to the document. As will be further explained below, document linking system **110** may track and/or log user credentials corresponding to user devices **140** that access, view, acknowledge, sign, and/or modify the document corresponding to the document link.

[0042] In some embodiments, user device **140A** may be used to deliver a document to user device **140B**. User device **140A** may use document delivery system **130A** to send the document via a message. Upon accessing document delivery system **130A**, a user may provide a user selection on a graphical user interface (GUI) provided by document delivery system **130A** to select the plugin or widget corresponding to document linking system **110**. Based on this selection, document linking system **110** may generate another GUI allowing user device **140** to generate or supply a document for delivery as a document link.

[0043] Document linking system **110** may provide a front-end user interface to allow users to create, manage, edit, and/or modify documents. The user interface may be a graphical user interface (GUI) that may be accessed and/or displayed on a user device **140**. Upon selecting the plugin or widget, user device **140** may use an application programming interface (API) to communicate with document linking system **110**.

[0044] As will be further explained below, document linking system **110** may provide a front-end GUI including GUI elements allowing a user to create documents, modify documents, manage document permissions, generate links and/or messages corresponding to documents, manage document modifications from other parties, manage a digital wallet, manage user account information and/or account roles, and/or other document interactions. In some embodiments, document linking system **110** may facilitate the incorporation of GUI elements into a GUI implemented by document delivery system **130** to allow users to access the operations provided by document linking system **110**. For example, document linking system **110** may provide a plugin or widget that may be incorporated, integrated, or overlaid onto a GUI generated by a document delivery system **130** to provide document linking and/or document token functionality.

[0045] In some embodiments, document linking system **110** may provide executable code and/or software instructions to a document delivery system **130** to generate an icon and/or button allowing a user to create or upload a document. The user may interact with the icon or button via a selection, press, or click on the GUI generated by the document delivery system **130**. In response to this interaction, the document delivery system **130** may communicate with document linking system **110** to provide a user device **140** with access to the document creation GUI supplied by document linking system **110**. As will be further described with reference to FIG. 6, the document creation GUI may allow a user to create a new document and/or upload a document. The document creation GUI may also include optional parameters that the user may select. These parameters may indicate permissions for downstream users accessing the document. For example, the document owner may designate that the downstream recipient is to sign or acknowledge the document. In some embodiments, the parameters may designate the document as shareable and/or downloadable.

[0046] In some embodiments, the document provided by user device **140** may be a contract or an offer document used in a contractual negotiation process. Using the GUI provided by document linking system **110**, a user may designate the contract as a document to be signed or acknowledged. In some embodiments, other documents may include to messages, attachments, clauses, online documents, smart documents, tokenized documents, contracts, smart contracts, tokenized contracts, agreements, records, files, books, archives, social media posts, news article, audio files, video files,

website links, and/or other types of digital documents.

[0047] Upon receiving a document, document linking system **110** may generate a document link and/or token corresponding to the received document. As will be further explained below, document linking system **110** may store an encrypted version of the document and/or create a link to the encrypted version of the document. Document linking system **110** may also generate a cryptographic hash of the document. Using this information along with other information such as an owner identification and/or other metadata, document linking system **110** may create a document token corresponding to the document. The document token may represent ownership of the document and/or may be transmitted to a digital wallet corresponding to the document owner. Document linking system **110** may use the document token in future operations to determine access and/or modification permissions.

[0048] After generating the document token, document linking system **110** may provide the document token to the corresponding document delivery system **130** as link. In some embodiments, document linking system **110** may generate a link without using a document token. The link may be to an address of the database **120** storing the document. The link generated by document linking system **110** may be embedded into a message being drafted by a user device **140**. A user device **140A** may indicate to document delivery system **130A** to transmit the message including the document link to an intended recipient. For example, this may be a user corresponding to user device **140B** and using document delivery system **130B**. In some embodiments, user device **140A** may designate the recipient using an email address, social media identification, and/or other electronic identification of the intended user. Document delivery system **130A** may then deliver the message to document delivery system **130B**.

[0049] Upon receiving the message with the document link, user device **140B** may access the document link. For example, document delivery system **130B** may generate an Internet browser or application view allowing the user of user device **140B** to select the document link. After selecting this link, user device **140B** may connect to document linking system **110** to access the corresponding document. User device **140B** may interact with the document based on the permissions set by user device **140A**. These permissions may be associated with the document link. For example, the permissions may include viewing the document, acknowledging receipt of the document, signing the document, downloading the document as a file, sharing the document, and/or modifying the document. User device **140B** may interact with the document according to this permission.

[0050] In some embodiments, to access the document, user device **140B** may supply user credentials to document linking system **110**. For example, if user device **140B** has an account corresponding to document linking system **110**, user device **140B** may supply these credentials. In some embodiments, document delivery system **130B** may supply the credentials on behalf of user device **140B**. For example, document delivery system **130B** may interact with document linking system **110** via a single sign-on process. In this manner, document linking system **110** may receive credentials corresponding to user device **140B** attempting to access the document. As will be further explained below, this may also occur if another user device **140C** also attempts to access the document link.

[0051] In some embodiments, document linking system **110** may record and/or log the access of the document link. Document linking system **110** may log this access in a document flow data structure. The document flow data structure may be stored in memory of document linking system **110**. The document flow data structure may reflect a timeline of interactions with the document. The document flow data structure may track user credentials corresponding to an interaction, a timestamp, and/or a type of interaction. For example, if the user is asked to acknowledge or sign the document, the document flow data structure may track the user credentials and/or time that the document has been acknowledged and/or signed. As will be further described below, the document owner may manage the document flow data structure to track and/or manage access to the

document as the document link is disseminated to additional user devices **140**.

[0052] For example, the document owner may track and/or manage permissions if user device **140B** forwards the document link to user device **140C**. In this case, when user device **140C** accesses the document link via document delivery system **130C**, user device **140C** and/or document delivery system **130C** may also provide credentials to document linking system **110** to access and/or modify the document. Document linking system **110** may track and/or log the access in a similar manner. The document owner may use user device **140A** to view the document flow data structure and view the access and/or modification performed by user device **140C**. The document owner may further manage permissions specific to user device **140C**. In some embodiments, even though user device **140A** has not directly transmitted the document link to user device **140C**, user device **140A** may still view a record of the access and/or modification.

[0053] User device **140A** may similarly manage permissions related to this access. These permissions may be managed using document linking system **110**. In this manner, even if the document link is disseminated to different user devices **140**, the permissions may still be controlled and/or altered without modifying the document link. Based on this modification, the document link may be disseminated and user device **140A** may tailor permissions specific to recipients attempting to access the document. In this manner, user device **140A** may be able to control and/or modify permissions corresponding to recipients that the user device **140A** has not designated or may not be aware of when initially transmitting the document link.

[0054] Based on this configuration, document linking system **110** may provide a decentralized manner for disseminating documents while retaining control and/or permissions related to downstream users. Document linking system **110** may provide a decentralized file system for users of document delivery systems **130**. By integrating a plugin or widget into these document delivery systems **130**, user devices **140** may access document linking system **110** to disseminate documents via messages. Document linking system **110** may securely manage these documents and provide control over downstream access and/or modification of the documents.

[0055] In some embodiments, document linking system **110** may include object storage, a web service interface, storage for Internet applications, and/or cloud computing and/or storage. In some embodiments, document linking system **110** may use a peer-to-peer network and/or protocol for storing and/or sharing data in a distributed file system. For example, document linking system **110** may use content-addressing to uniquely identify files in a global namespace to network user devices **140**. In some embodiments, document linking system **110** may use the InterPlanetary File System (IPFS) protocol and/or servers such as Amazon S3®.

[0056] Document linking system **110** may include an interface with database **120**. Database **120** may be a private or public blockchain. Document linking system **110** may use one or more smart contract functions to interface and/or publish data to a blockchain. The smart contract functions may include protocols to digitally facilitate, verify, and/or enforce transactions. The transactions may be trackable and irreversible. As will be further described below, document linking system **110** may interface with database **120** to store data representing documents and/or modifications to documents. This data may include a cryptographic hash of a document and/or a link to a human-readable representation of the document.

[0057] In some embodiments, document linking system **110** may also manage processing tokens used to interact with database **120** and/or a blockchain. For example, document linking system **110** may manage digital wallet information related to cryptocurrencies. Document linking system **110** may use and/or consume digital currencies to execute transactions to a blockchain. For example, document linking system **110** may also manage gas, transaction, and/or mining fees used to conduct a transaction, execute a blockchain contract, and/or publish data onto a blockchain in a block. As will be further explained below, document linking system **110** may also manage document tokens which may represent ownership and/or permissions for documents and/or document modifications. Document linking system **110** may facilitate the publishing of document



data to the blockchain and/or may remove processing tokens from an account corresponding to a digital wallet to perform the publishing.

[0058] To manage documents, document linking system **110** may publish the cryptographic hash of the document and/or the link to the encrypted version of the document using smart contract functions. The document may be encrypted using a key corresponding to the document owner. Publishing the document data onto the blockchain may preserve the trustworthiness of the document and the legitimacy of the document's content. For example, the immutable nature of a blockchain may protect against unauthorized document modifications or tampering. Further, the cryptographic hash may preserve privacy and may prevent other users of the blockchain from viewing confidential information.

[0059] In some embodiments, the document token may indicate that a recipient should acknowledge or sign a document. After accessing the link, document linking system **110** may identify an encrypted version of the document. The document linking system **110** may then decrypt the encrypted document using a digital signature key corresponding to the recipient. The recipient may provide a digital signature to confirm the acceptance. This digital signature may also be keyed to the recipient to provide verification and additional trustworthiness that the signature is legitimate and protected against interference or tampering. In some embodiments, the digital signature may also be reflected in the human-readable portion of the document.

[0060] In some embodiments, the digital signature may be a modification to the document. Document linking system **110** may manage this modification in a manner similar to generating a document so that the modified document may be preserved using database **120**. For example, the signed document may be encrypted and stored as a modified version of the document. Document linking system **110** may generate a corresponding link to this encrypted version of the signed document and/or generate a cryptographic hash of the signed document. Document linking system **110** may create a document token corresponding to the signed document. Document linking system **110** may publish the hash and/or the link to the encrypted version of the signed document to a blockchain. Similarly, the encryption may have been performed using a key corresponding to the signing party to preserve confidentiality. In this manner, document linking system **110** may facilitate the acknowledgement or signing of a document or a contract using a document management process using a blockchain. In some embodiments, document linking system **110** may store and/or manage modifications using database **120**.

[0061] Similar to the acknowledgment or signing of a document, document linking system **110** may manage document editing and/or modification. For example, user devices **140B** and **140C** may participate in editing the document. Document linking system **110** may use a tokenization process to manage different versions of the document corresponding to the different modifications.

[0062] Document linking system **110** may manage this modification in a manner similar to generating a document so that the modified document may be preserved using database **120** and/or a blockchain. The modified document may be encrypted and stored as a modified version of the document. Document linking system **110** may generate a corresponding link to this encrypted version of the modified document and/or generate a cryptographic hash of the modified document. In some embodiments, document linking system **110** may update an association corresponding to the document link to access the modified document. For example, a downstream user using the document link may be directed to the modified version of the document. The document flow data structure may also be updated to track the modification. The document owner may view this modification and/or accept or reject the modification. In some embodiments, downstream users may also be able to view the document flow data structure to track the changes. In some embodiments, document linking system **110** may create a separate document token and/or document link corresponding to the modified document. Document linking system **110** may publish the hash and/or the link to the encrypted version of the modified document to a blockchain.

[0063] FIG. **1B** depicts a block diagram of a document management environment **100B** with

downstream dissemination, according to some embodiments. Similar to FIG. 1A, document management environment **100B** may include document linking system **110**, database **120**, document delivery systems **130**, and/or user devices **140**. Document management environment **100B** depicts an example embodiment of a data communication path corresponding to downstream dissemination.

[0064] In this case, user device **140A** may seek to disseminate a document that may not be editable. User device **140A** may use document delivery system **130A** to deliver the document to user device **140B** via document delivery system **130B**. User device **140A** may select a plugin or widget corresponding to document linking system **110** to generate a document token and/or document link corresponding to the document. User device **140A** may designate the document as being public. Document linking system **110** may transmit the document link to document delivery system **130A**. Document delivery system **130A** may then embed the document link in the message being drafted by user device **140A**. User device **140A** may then send the message to user device **140B** via document delivery systems **130A**, **130B**.

[0065] User device **140B** may then access the document link in the manner described above. Document linking system **110** may log and/or track this access. Document linking system **110** may provide the document for viewing and/or downloading based on the permissions set by user device **140A**.

[0066] In some embodiments, user device **140B** may forward the message to user device **140C** via document delivery systems **130B**, **130C**. For example, user device **140B** may forward the original message, may copy and paste the document link into a new message, and/or may switch between email and/or social media post to further disseminate the document link. User device **140C** may receive the document link via document delivery system **130C**. User device **140C** may then access and/or download the document via the document link. Document linking system **110** may track credentials and/or access information corresponding to user device **140C**. User device **140A** may view this access information and/or modify permissions corresponding to user devices **140B** and/or **140C**. This permission control is further described with reference to FIG. 1D.

[0067] FIG. 1C depicts a block diagram of a document management environment **100C** with document collaboration, according to some embodiments. Similar to FIG. 1A, document management environment **100C** may include document linking system **110**, database **120**, document delivery systems **130**, and/or user devices **140**. Document management environment **100C** depicts an example embodiment of a data communication path corresponding to downstream dissemination with collaboration.

[0068] In this case, user device **140A** may seek to disseminate a document that may be editable. User device **140A** may use document delivery system **130A** to deliver the document to user device **140B** via document delivery system **130B**. User device **140A** may select a plugin or widget corresponding to document linking system **110** to generate a document token and/or document link corresponding to the document. User device **140A** may designate the document as being editable. Document linking system **110** may transmit the document link to document delivery system **130A**. Document delivery system **130A** may then embed the document link in the message being drafted by user device **140A**. User device **140A** may then send the message to user device **140B** via document delivery systems **130A**, **130B**.

[0069] User device **140B** may then access the document link in the manner described above. Document linking system **110** may log and/or track this access. Document linking system **110** may provide the document for viewing, downloading, and/or editing based on the permissions set by user device **140A**.

[0070] In some embodiments, user device **140B** may edit the document using document linking system **110**. For example, document linking system **110** may generate a GUI with the document. User device **140B** may edit and/or modify this document in this GUI. In some embodiments, an acknowledgment or a signature may be a modification. In some embodiments, user device **140B**

may modify other content in the document. After preserving this editing, document linking system **110** may generate a second document token corresponding to the modified document. This second document token may distinguish the modified document from the original document generated by user device **140A**. In some embodiments, this second document token may represent a second version of the document. Upon generating the second document token, document linking system **110** may associate the second document token with the document link such that accessing the document link provides access to the second document token. In this manner, the document link may provide access to the modified document.

[0071] User device **140B** may also modify the document by downloading the document, modifying the document locally, and uploading a modified version of the document. In this case, document linking system **110** may generate a second document token as described above and update the document link accordingly. Document linking system **110** may track the modification and upload of a new version.

[0072] As previously described, document linking system **110** may track edits, modifications, acknowledgments, and/or signatures using a document flow data structure. This document flow data structure may track one or more document tokens and corresponding versions. The modifications may be tracked with time stamps and/or identifying user information to identify users providing modifications. In this manner, a document owner may view modifications to the document as the document link is disseminated. The document owner may manage these modifications. For example, the document owner may accept or reject the modifications and/or associate different versions of the document with the document link. Actions taken by the document owner may be tracked in the document flow data structure. In some embodiments, downstream users may be able to view the document flow data structure. This may depend on whether the document owner has chosen to provide this access to downstream users. Using the document flow data structure, document linking system **110** may track modifications and/or track access as the document is modified.

[0073] In some embodiments, user device **140B** may provide the document link to user device **140C**. For example, user device **140B** may be collaborating with user device **140C** to modify the document. User devices **140B**, **140C** may perform one or more iterations of the document to modify the document. Despite the modifications, user devices **140B**, **140C** may use the same document link. Document linking system **110** may track the modifications as well as user credentials corresponding to the modifications. In some embodiments, document linking system **110** may store modified versions of the document on database **120**.

[0074] User device **140A** corresponding to the document owner may view the document flow data structure to monitor the modifications. In some embodiments, user device **140A** may accept or reject modifications entered by user devices **140B**, **140C**. As will be further described with reference to FIG. 1D, user device **140A** may also restrict access to the document to one or more downstream users. In this case, document linking system **110** may update the document flow data structure with this restriction.

[0075] FIG. 1D depicts a block diagram of a document management environment **100D** with permission control, according to some embodiments. Similar to FIG. 1A, document management environment **100D** may include document linking system **110**, database **120**, document delivery systems **130**, and/or user devices **140**. Document management environment **100D** depicts an example embodiment of a data communication path corresponding to downstream dissemination with a restriction **150**.

[0076] In this case, user device **140A** may seek to disseminate a document that may or may not be editable. User device **140A** may use document delivery system **130A** to deliver the document to user device **140B** via document delivery system **130B**. User device **140A** may select a plugin or widget corresponding to document linking system **110** to generate a document token and/or document link corresponding to the document. Document linking system **110** may transmit the

document link to document delivery system **130A**. Document delivery system **130A** may then embed the document link in the message being drafted by user device **140A**. User device **140A** may then send the message to user device **140B** via document delivery systems **130A**, **130B**. [0077] User device **140B** may then access the document link in the manner described above. Document linking system **110** may log and/or track this access. Document linking system **110** may provide the document for viewing, downloading, and/or editing based on the permissions set by user device **140A**.

[0078] User device **140B** may forward the message to user device **140C** via document delivery systems **130B**, **130C**. For example, user device **140B** may forward the original message, may copy and paste the document link into a new message, and/or may switch between email and/or social media post to further disseminate the document link. User device **140C** may receive the document link via document delivery system **130C**. User device **140C** may then access and/or download the document via the document link. Document linking system **110** may track credentials and/or access information corresponding to user device **140C**.

[0079] User device **140A** may view this access information and/or modify permissions corresponding to user devices **140B** and/or **140C**. For example, user device **140A** may determine that the user corresponding to user device **140C** should no longer be able to view and/or download the document. User device **140A** may send a command to document linking system **110** to alter this access. Document linking system **110** may associate this permission with the credentials provided by user device **140C**. Document linking system **110** may generate a restriction **150** based on these credentials. For example, the credentials may correspond to the single sign on credentials provided by document delivery system **130C**. In this manner, restriction **150** may be conditioned on the credentials corresponding to document delivery system **130C**. While restriction **150** is depicted with respect to user device **140C**, user device **140A** may restrict permissions corresponding to user device **140B**.

[0080] In some embodiments, restriction **150** may be applied to a document and/or to individual users attempting to access the document. For example, a document owner may apply restriction **150** to each user attempting to access the document via the document link. This may occur to restrict access to the document from each user. In some embodiments, the document owner may restrict access after determining that a particular user has accessed the document. For example, after viewing the document flow data structure, the document owner may determine that a particular user who has accessed the document should not have access. This may be noted based on the logging performed by the document flow data structure. After determining that a particular user should not have access, document linking system **110** may apply restriction **150** to that user. This may be applied to the credentials used by the user to access document linking system **110** and/or a corresponding document delivery system **130**.

[0081] Restriction **150** may be applied to different permissions. For example, rather than preventing viewing of the document, a document owner may change download and/or editing permissions for a particular user. This control may provide additional flexibility for controlling access as a document is disseminated.

[0082] Based on the restrictions **150** applied by document linking system **110**, document linking system **110** may provide downstream control related to access of a document. This control may occur even a document link is disseminated beyond an initial one or more recipients. A document owner may tailor restrictions and/or permissions to additional individuals accessing the document as the document is disseminated. In some embodiments, the document link may specify a default permission, such as public, semi-public, or confidential as previously explained. Document linking system **110** may then adjust different permissions for different users even after the document link has been disseminated.

[0083] Other functions and/or operations of document linking system **110** will now be further described with reference to the other figures of this disclosure.

[0084] FIG. 2 depicts a flowchart illustrating a method **200** for generating a document token, according to some embodiments. Method **200** shall be described with reference to FIG. **1A**; however, method **200** is not limited to that example embodiment.

[0085] In an embodiment, document linking system **110** may facilitate the generation of a document, document token, and/or a document link. While method **200** is described with reference to document linking system **110**, method **200** may be executed on any computing device, such as, for example, the computer system described with reference to FIG. **16** and/or processing logic that may comprise hardware (e.g., circuitry, dedicated logic, programmable logic, microcode, etc.), software (e.g., instructions executing on a processing device), or a combination thereof.

[0086] It is to be appreciated that not all steps may be needed to perform the disclosure provided herein. Further, some of the steps may be performed simultaneously, or in a different order than shown in FIG. **2**, as will be understood by a person of ordinary skill in the art.

[0087] At **205**, document linking system **110** may receive a document creation request via a user selection of an interface object integrated into an application managed by a document delivery system **130**. The document linking system **110** may have provided instructions to the document delivery system **130** to generate the interface object. As explained with reference to FIG. **1A**, the interface object may be a plugin or widget. A document delivery system **130** may receive configurable coded instructions, executable instructions, programming, and/or other software to implement the interface object. The interface object may be implemented into a messaging webpage and/or application. A user device **140** accessing document delivery system **130** may select the interface object to generate a document creation request. As will be further explained below, document linking system **110** may provide a graphical user interface (GUI) to be displayed on user device **140**. User device **140** may interact with the GUI via API interactions. In some embodiments, document linking system **110** may manage user accounts and/or user profiles. A user may log-in to the document linking system **110** to generate a document creation request. In some embodiments, user credentials may be provided to document linking system **110** by document delivery system **130**.

[0088] As previously explained, the document creation request may be initiated from an interaction with a web widget on a web page. For example, a website managed by document delivery system **130** may include a widget that may trigger document linking system **110** to facilitate the creation of a document. The website may be managed by a third-party system and/or administrator while document linking system **110** may facilitate document creation in response to a user interacting with the widget. The widget may be a plug-in for the website. In some embodiments, the widget may be implemented in a web application, messaging application, and/or a mobile application.

[0089] At **210**, document linking system **110** may facilitate the creation of a document. In some embodiments, document linking system **110** may receive an upload of a document from a user device **140**. After receiving credentials from user device **140** and/or document delivery system **130**, document linking system **110** may generate a GUI allowing user device **140** to upload a document file. As further explained below, document linking system **110** may generate a document token and/or a document link based on the document.

[0090] In some embodiments, document linking system **110** may generate a GUI element to be displayed on user device **140** to allow a user to generate a document. For example, the GUI element may be a fillable form allowing a user to input textual inputs. In some embodiments, the fillable form may include fields indicating requested textual data. A user may input textual data to designate the content of the document. The GUI element may be a pop-up template or form on a web page currently being viewed on the user device **140**. The GUI element may allow the user to draft a document. While the user may generate a document via typewritten text and/or a fillable form, the creation of the document may also allow the user to attach additional documents. For example, the user may include links to documents stored in a cloud storage system to be included in the generated document.

[0091] At **215**, document linking system **110** may encrypt and/or store an encrypted version of the document. For example, document linking system **110** may encrypt the document using a digital key corresponding to the user generating the document and/or the user intended to receive the document. Document linking system **110** may facilitate the distribution of keys to the recipient of the document. Document linking system **110** may use this key to encrypt the document generated by the document owner. In some embodiments, the document owner may provide a cryptographic key, and document linking system **110** may use the document owner's key to encrypt the document. Document linking system **110** may then provide this key to the recipient for decrypting the document.

[0092] In some embodiments, document linking system **110** may store an encrypted version of the document in a database. The database may be web-accessible and may be accessed using a link generated at **220**. At **220**, document linking system **110** may create a link to the encrypted version of the document. The link may be a document link. This document link may be embedded and/or shared. The document link may be a uniform resource locator (URL) or other web address identifying the storage location of the encrypted document. Because the stored document is encrypted, discovery of the link may still maintain confidentiality due to the encrypted nature of the document. In some embodiments, user credentials provided to document linking system **110** may provide access to the decrypted version of the document.

[0093] At **225**, document linking system **110** may generate a hash of the document. The hash may be a cryptographic hash of the document. This cryptographic hash may be a one-way hash function and/or may be used on a database **120** and/or blockchain to provide block verification. This may provide a decentralized configuration for a blockchain using a proof of work algorithm or other types of blockchain proof algorithms or methodologies. The hash may further provide proof that a document has not experienced tampering and is a true representation of the document.

[0094] At **230**, document linking system **110** may create a document token corresponding to the document. The document token may represent ownership of the document. A document token may be a type of digital token, crypto token, or virtual currency that may be used with digital wallets to designate ownership. A document token, however, may differ from a cryptocurrency as document tokens may be non-fungible and instead may be unique to each created document. In some embodiments, the permissions may correspond to a secrecy designation related to the document as previously described. The secrecy designation may be metadata corresponding to the document token. In some embodiments, document linking system **110** may publish the hash of the document and/or the link to the encrypted version of the document to a blockchain using one or more smart contract functions. Publishing the hash of the document and/or the link to the encrypted version of the document may preserve the document and indicate a version of the document that may be trusted as free from tampering. The publication of these elements may further preserve a party's contractual position.

[0095] At **235**, document linking system **110** may transmit the document token to the document delivery system **130** as a link to populate a message in the messaging application. As previously explained, a user may be generating a message and may wish to disseminate a document using the message application corresponding to a document delivery system **130**. Document linking system **110** may embed a document link in this message for dissemination. In some embodiments, rather than transmitting the document token as a link, document linking system **110** may transmit the link generated in **220** to the document delivery system **130**.

[0096] FIG. 3A depicts a flowchart illustrating a method **300A** for tracking document access via a document token, according to some embodiments. Method **300A** shall be described with reference to FIG. 1A; however, method **300A** is not limited to that example embodiment.

[0097] In an embodiment, document linking system **110** may track downstream access via a document link. This access may correspond to accessing, viewing, downloading, sharing, acknowledging, signing, editing, and/or modifying the document. While method **300A** is described

with reference to document linking system **110**, method **300A** may be executed on any computing device, such as, for example, the computer system described with reference to FIG. **16** and/or processing logic that may comprise hardware (e.g., circuitry, dedicated logic, programmable logic, microcode, etc.), software (e.g., instructions executing on a processing device), or a combination thereof.

[0098] It is to be appreciated that not all steps may be needed to perform the disclosure provided herein. Further, some of the steps may be performed simultaneously, or in a different order than shown in FIG. **3A**, as will be understood by a person of ordinary skill in the art.

[0099] At **305**, document linking system **110** may create a link corresponding to a document generated by a first user account. For example, the first user account may correspond to user device **140A**. Document linking system **110** may generate a document link in a manner similar to that described with reference to FIGS. **1A** and **2**. At **310**, document linking system **110** may transmit the link to a document delivery system **130A** to populate a message in the messaging application. In some embodiments, this may be a document token link. This may occur in a manner similar to that described with reference to FIGS. **1A** and **2**.

[0100] At **315**, document linking system **110** may receive a first access request from a first client device corresponding to a second user account to access the document via user selection of the link. In this case, the first client device may correspond to user device **140B**. The user selection may be a selection of the link within a message received from user device **140A** and/or document delivery system **130A**. Upon accessing the link, document linking system **110** may request log-in credentials for the user. These log-in credentials may correspond to document linking system **110**. In some embodiments, the log-in credentials may correspond to document delivery system **130B** servicing user device **140B**. In this manner, if document delivery system **130B** interfaces with document linking system **110**, document delivery system **130B** may provide a single sign on process for user device **140B**.

[0101] At **320**, document linking system **110** may log the first access request with one or more credentials corresponding to the second user account in a document flow data structure. As described with reference to FIG. **1A**, the first access request may correspond to a permission set by document linking system **110**. For example, if the permission may be set for access requests to correspond to viewing the document, document linking system **110** may identify the access request as a viewing performed by user device **140B**. As previously explained, document linking system **110** may log this viewing in a document flow data structure with credentials corresponding to the user and/or a time stamp corresponding to the interaction. In some embodiments, the access request may correspond to accessing, viewing, downloading, sharing, acknowledging, signing, editing, and/or modifying the document. In this case, document linking system **110** may log this interaction for the document. The document flow data structure may also track document participants and/or events such as creation, viewing, signing, sharing or downloading. The document flow data structure may also track times, dates, and/or locations like the latitude and longitude of digitally transmitted information. For example, the document flow data structure may track global positioning coordinates related to the first access request.

[0102] At **325**, document linking system **110** may transmit the document to the first client device corresponding to the second user account. Document linking system **110** may transmit the document according to the permissions set by the first user account. The second user account may interact with the document according to the permission. The second user account may also further disseminate the document link to other client devices. In this case, document linking system **110** may receive a request to access the document from other client devices.

[0103] At **330**, document linking system **110** may receive a second access request from a second client device corresponding to a third user account to access the document via user selection of the link. The second client device may correspond to user device **140C**. As previously explained, this may occur in the situation where user device **140B** forwards the document link to user device

**140C**. This may occur with or without the knowledge of the document owner. User device **140C** may then attempt to access the document using the link.

[0104] At **335**, document linking system **110** may log the second access request with one or more credentials corresponding to the third user account in the document flow data structure. This logging may occur in a manner similar to **320**. Document linking system **110** may track access from the second client device. At **340**, document linking system **110** may transmit the document to the second client device corresponding to the third user account. This may occur in a manner similar to **325**. Access to the document may be controlled based on the permissions set by the document owner and/or determined by document linking system **110**. The third user account may interact with the document based on this permission.

[0105] At **345**, document linking system **110** may generate a graphical user interface (GUI) accessible by the first user account displaying logged data from the document flow data structure. For example, using user device **140A**, the first user account or document owner may view the GUI. An example of this GUI is described with reference to FIG. **10**. Using the GUI, the first user account may set permissions corresponding to document access. As previously explained, these permissions may correspond to the document and/or may be individualized corresponding to each user account. Using this GUI, a document owner may track interactions with the document. These interactions may be different and/or may be timestamped to reflect the interaction. In some embodiments, global positioning locations may also be tracked with these interactions

[0106] FIG. **3B** depicts a flowchart illustrating a method **300B** for managing document permissions, according to some embodiments. Method **300B** shall be described with reference to FIG. **1A**; however, method **300B** is not limited to that example embodiment.

[0107] In an embodiment, document linking system **110** may execute method **300B** after method **300A**. Using method **300B**, a document owner may modify downstream permissions. This modification may occur even after a document link has been disseminated. Method **300B** described with reference to FIG. **16** and/or processing logic that may comprise hardware (e.g., circuitry, dedicated logic, programmable logic, microcode, etc.), software (e.g., instructions executing on a processing device), or a combination thereof.

[0108] It is to be appreciated that not all steps may be needed to perform the disclosure provided herein. Further, some of the steps may be performed simultaneously, or in a different order than shown in FIG. **3B**, as will be understood by a person of ordinary skill in the art.

[0109] At **350**, document linking system **110** may transmit the GUI to a client device corresponding to the first user account. As described with reference to **345**, the client device may be user device **140A** and/or may correspond to the document owner. The user corresponding to the first user account may view the document flow data structure data indicating interactions with the document.

[0110] At **355**, document linking system **110** may receive, via the GUI, a user selection designating a permission restriction for the document for the second user account or the third user account. The document owner may specify a restriction corresponding to one or more downstream users. This restriction may remove and/or alter previously granted permissions. For example, a user that was previously allowed to modify the document may be disallowed. In some embodiments, **355** may also be used to grant permissions and/or remove restrictions. At **360**, document linking system **110** may modify the document flow data structure to designate the permission restriction for the second user account or the third user account. Updating the document flow data structure may include storing the updated permissions or restrictions with a timestamp. In some embodiments, the restrictions and/or permissions may be associated with the user credentials supplied by user devices **140B**, **140C** and/or document delivery systems **130B**, **130C**.

[0111] At **365**, document linking system **110** may receive a third access request to access the document from the first client device corresponding to the second user account or from the second client device corresponding to the third user account. This third access request may occur after the change in permissions and/or restrictions. In this case, the client devices may attempt to use the



document link to access the document. In some embodiments, the client devices may attempt to access the document via document delivery systems **130B**, **130C**.

[0112] At **370**, document linking system **110** may determine whether the permission restriction restricts access to the document. In some embodiments, document linking system **110** may compare credentials provided by the client devices to the credentials stored in the document flow data structure. If a restriction matches the credentials, the access to the document may be restricted. As previously described, this restriction may prevent viewing the document. In some embodiments, the restrictions may be for different functions such as modifying the document. In this case, a user may be allowed to view the document but not allowed to commit modifications to the document. At **375**, document linking system **110** may determine whether to restrict access to the document based on the user credentials.

[0113] At **380**, if the restriction prevents access to the document, document linking system **110** may prevent the document from being transmitted to the first client device or the second client device based on the permission restriction designated in the document flow data structure. In some embodiments, this restriction may prevent a particular user from viewing the document. As previously explained, this restriction may be associated with user credentials and may prevent access based on received user credentials. In some embodiments, the restriction may be a change to the default permission for the document.

[0114] At **385**, if the restriction does not prevent access to the document, document linking system **110** may transmit the document to the first client device or the second client device while restricting functionality based on the permission restriction designated in the document flow data structure. In this case, the restriction may still permit viewing the document but may restrict and/or prevent other interactions. For example, users may not be able to edit or modify the document.

[0115] Using methods **300A** and/or **300B**, a document owner may be able to view, manager, and/or control downstream dissemination of documents. A document owner may be able to view interactions with the document via the document flow data structure. The document owner may also be able to specify restrictions tailored to individuals attempting to access the document. This may occur even if the document owner is unaware of the users who receive document links. While the foregoing description has focused on restricting permissions, the document owner may also grant permissions in a similar manner.

[0116] FIG. **4** depicts a flowchart illustrating a method **400** for modifying a document, according to some embodiments. Method **400** shall be described with reference to FIG. **1A**; however, method **400** is not limited to that example embodiment.

[0117] In an embodiment, document linking system **110** may facilitate the modification of a document. This modification may be permitted depending on the permissions corresponding to a document token. While method **400** is described with reference to document linking system **110**, method **400** may be executed on any computing device, such as, for example, the computer system described with reference to FIG. **16** and/or processing logic that may comprise hardware (e.g., circuitry, dedicated logic, programmable logic, microcode, etc.), software (e.g., instructions executing on a processing device), or a combination thereof.

[0118] It is to be appreciated that not all steps may be needed to perform the disclosure provided herein. Further, some of the steps may be performed simultaneously, or in a different order than shown in FIG. **4**, as will be understood by a person of ordinary skill in the art.

[0119] At **405**, document linking system **110** may create a link corresponding to a document generated by a first user account. For example, the first user account may correspond to user device **140A**. Document linking system **110** may generate a document link and/or document token in a manner similar to that described with reference to FIGS. **1A** and **2**. At **410**, document linking system **110** may transmit the document link and/or the first document token as a link to a document delivery system **130A** to populate a message in the messaging application. This may occur in a manner similar to that described with reference to FIGS. **1A** and **2**.

[0120] At **415**, document linking system **110** may receive an access request from a client device corresponding to a second user account to access the document via user selection of the link. In this case, the client device may correspond to user device **140B**. The user selection may be a selection of the link within a message received from user device **140A** and/or document delivery system **130A**. Upon accessing the link, document linking system **110** may request log-in credentials for the user. These log-in credentials may correspond to document linking system **110**. In some embodiments, the log-in credentials may correspond to document delivery system **130B** servicing user device **140B**. In this manner, if document delivery system **130B** interfaces with document linking system **110**, document delivery system **130B** may provide a single sign on process for user device **140B**.

[0121] At **420**, document linking system **110** may transmit the document to the client device corresponding to the second user account. Document linking system **110** may transmit the document according to the permissions set by the first user account. The second user account may interact with the document according to the permission. In some embodiments, the second user account may be permitted to modify the document.

[0122] At **425**, document linking system **110** may receive a modification of a portion of the document and generate a modified document. In some embodiments, this modification may be the upload of a modified version of the document. In some embodiments, a user may modify the document using a GUI displayed on user device **140B**. The GUI may be provided by document linking system **110**. Document linking system **110** may capture and/or save the modification. In some embodiments, the modification may be an acknowledgment and/or a signature corresponding to the document.

[0123] At **430**, document linking system **110** may log the modification with one or more credentials corresponding to the second user account in a document flow data structure. As previously described, this logging may also preserve a time stamp corresponding to the second user account. Logging the modification in the document flow data structure may associate the modification with the second user account. The document owner may view the document flow data structure to track modifications to the document.

[0124] In some embodiments, document linking system **110** may create a second document token corresponding to the modified document. Document linking system **110** may preserve the first document token as the original document while saving the modified version of the document as a second document token. In some embodiments, document linking system **110** may preserve the document tokens on database **120** and/or a blockchain. Because of the immutability of a blockchain, subsequent modifications may be preserved. In some embodiments, modifications may be preserved in database **120** without using document tokens.

[0125] At **435**, document linking system **110** may update an association for the link such that accessing the link corresponds to an access request for the modified document. For example, document linking system **110** may modify a database **120** entry to associate the modified document with the link. In this case, a document link may be shared between different users collaborating and/or modifying a document. Document linking system **110** may provide the modified documents to each user to view the collaboration. In some embodiments, document linking system **110** may track the modifications using a document flow data structure to track the modifications. In some embodiments, a document owner and/or other users may view modified and/or unmodified document when accessing the link. In some embodiments, a document owner may accept or reject a modified version of the document. In this case, the link may be updated to reflect a version of the document that has been accepted.

[0126] FIG. 5A depicts a block diagram of a graphical user interface (GUI) **500A** including a document token generation plugin, according to some embodiments. GUI **500A** may be generated by a document delivery system **130** and/or may be displayed on a user device **140**. Document delivery system **130** may present GUI **500A** for a user to draft a message to send to one or more

intended recipients. GUI **500A** may include a recipient portion **510** and/or a message portion **520**. The recipient portion **510** may be used to designate recipient information and/or subject information for a message. Message portion **520** may include the body of the message and/or may include a document link as provided by document linking system **110**. Document linking system **110** may generate the document link to be inserted into the message by document delivery system **130**. This may be inserted in message portion **520**.

[0127] To generate the document link, a user may select link icon **530**. Link icon **530** may be a GUI element integrated into GUI **500A**. Link icon **530** may correspond to a widget or plugin provided by document linking system **110**. Document delivery system **130** may receive configurable coded instructions, programming, and/or software to generate link icon **530**. When a user selects link icon **530**, document delivery system **130** may interface with document linking system **110** via an application programming interface (API). Via the API, document linking system **110** may provide a GUI for accepting a document. This GUI is further described with reference to FIG. **6**. After receiving the document, document linking system **110** may generate a document link to be inserted into the message managed by document delivery system **130**.

[0128] FIG. **5B** depicts a block diagram of a graphical user interface (GUI) **500B** including a document token generation plugin in a toolbar, according to some embodiments. Similar to GUI **500A**, GUI **500B** may be provided by a document delivery system **130**. For example, GUI **500A** may correspond to document delivery system **130A** while GUI **500B** may correspond to document delivery system **130B**. GUI **500B** may include a recipient portion **540** similar to recipient portion **510**. GUI **500B** may also include message portion **550** similar to message portion **520**. GUI **500B** may also include link icon **560** similar to link icon **530**. Link icon **560** may be included in a toolbar. Document delivery system **130** may integrate link icon **560** into this toolbar with other icons usable by the user to generate the message. Accessing link icon **560** may provide access to document linking system **110** in a manner similar to GUI **500A**.

[0129] GUIs **500A** and **500B** may demonstrate that the plugin or widget provided by document linking system **110** may be integrated into different types of document delivery systems **130**. These different document delivery system **130** may generate corresponding link icons **530**, **560** in different manners as well. Document linking system **110** may still provide the document link functionality regardless of the type of document delivery system **130**. For example, this link may be implemented into a web page, web application, cloud application, mobile application, and/or other platform managed by a document delivery system **130**.

[0130] FIG. **6** depicts a block diagram of a graphical user interface (GUI) **600** for creating a document token, according to some embodiments. GUI **600** may be provided to a user device **140** from document linking system **110**. User device **140** may interact with GUI **600** for providing a document to document linking system **110**. GUI **600** may include a document creation icon **610**, a document upload icon **620**, a permission designation **630**, a confirmation icon **640**, and/or a menu bar **650**.

[0131] In some embodiments, GUI **600** may include one or both of a document creation icon **610** and a document upload icon **620**. A user may use icons **610**, **620** to provide a document to document linking system **110**. As previously described, using document creation icon **610** may allow a user to draft a document via document linking system **110**. Using document upload icon **620** may allow a user to upload a document to document linking system **110**. Using permission designation **630**, the user may also designate a permission corresponding to the document. In some embodiments, this may be a default permission for the document. In some embodiments, the permissions may indicate that the document is to be signed, acknowledged, shareable, and/or downloadable. Permission designation **630** may also include other permissions such as whether the document may be modified. After supply the document, the user may select confirmation icon **640** to confirm the generation of the document link.

[0132] Included in GUI **600** may also be a menu bar **650**. The menu bar **650** may be provided by

document linking system **110** to navigate different document aspects. For example, the user may select a profile button to view user account information corresponding to the user. Similarly, the user may select a home button to return to a home screen to view one or more documents corresponding to the user. These documents may be documents created and/or accessed by the users. Menu bar **650** may also include a notifications button to identify notifications related to one or more documents. These notifications may include, for example, updates to document flow data structures corresponding to the documents. For example, if a user has signed or acknowledged a document associated with the user account, document linking system **110** may generate a notification for the document owner and/or other users associated with the document.

[0133] FIG. **7** depicts a block diagram of a graphical user interface (GUI) **700** displaying a message **710** including a document link **720**, according to some embodiments. A user may receive message **710**, which may include document link **720**. As previously explained, document link **720** may have been inserted into the message **710** prior to sending the message to an intended recipient. The sender of message **710** may include other information in the body of the message as well. Upon receiving message **710**, the recipient may select document link **720** to access document linking system **110** and/or the corresponding document. In some embodiments, document link **720** may be used in a web browser and/or via the document delivery system **130** corresponding to the recipient.

[0134] FIG. **8** depicts a block diagram of a graphical user interface (GUI) **800** for signing into a document linking system **110**, according to some embodiments. A user device accessing a document link may be provided with GUI **800** to receive credentials from a user. GUI **800** may include a single sign on button **810**, an username field **820**, password field **830**, and/or sign in button **840**. If a user selects single sign on button **810**, the user may intend to use the same credentials corresponding to a document delivery system **130** as credentials for document linking system **110**. Upon selecting single sign on button **810**, the document delivery system **130** corresponding to the user may provide credentials to document linking system **110**. The credentials may include identification information identifying the user. For example, this may include a name and/or image.

[0135] In some embodiments, rather than using a single sign on process, the user may create an account with document linking system **110**. The user may supply an email address or username using username field **820** to sign into document linking system **110**. Similar, the user may supply a password using password field **830**. Selecting sign in button **840** may deliver this information to document linking system **110** to provide credentials to document linking system **110**. As previously explained, document linking system **110** may use the provided credentials and/or the single sign on credentials to log interactions with the document.

[0136] FIG. **9A** depicts a block diagram of a graphical user interface (GUI) **900A** displaying a document **930** corresponding to a document link, according to some embodiments. Document linking system **110** may provide GUI **900A** to a user device **140** after receiving corresponding credentials and/or confirming that the user is not restricted from accessing document **930**. GUI **900A** may include document **930**, menu button **910**, back button **920**, acknowledge button **940**, and/or menu bar **950**.

[0137] Document **930** may have been generated using document linking system **110** and/or provided by a user device **140**. If the document **930** has been transmitted for acknowledgment, GUI **900A** may include acknowledge button **940**. Selecting acknowledgement button **940** may indicate that the user has acknowledged receipt of document **930**.

[0138] The user may also select back button **920** to return to a previous screen. This previous screen may be, for example, a home screen and/or a screen with one or more other documents corresponding to the user. Menu bar **950** may be similar to menu bar **650**. In some embodiments, GUI **900A** may include menu button **910**. Selecting menu button **910** may display a menu overlay as further described with reference to FIG. **9B**.

[0139] FIG. **9B** depicts a block diagram of a graphical user interface (GUI) **900B** displaying a

menu overlaying the document, according to some embodiments. Selecting menu button **910** may display this menu. The menu overlaying the document may include a timeline button **960**, a download button **970**, and/or a share button **980**. As will be further described with reference to FIG. **10**, selecting the timeline button **960** may present a document flow to view the logged transactions corresponding to the document. Selecting download button **970** may allow the user to download a local copy of the document to the corresponding user device **140**. Selecting share button **980** may allow a user to identify users to receive the document and/or the document link. In some embodiments, this sharing may occur via an address book corresponding to the user account. In some embodiments, selecting the share button **980** may generate a document link that the user may send using another message.

[0140] In some embodiments, one or more of these options may be unavailable depending on the permissions provided for a user. For example, a document owner may have permission to use each of these functions. A downstream user, however, may not be allowed to use each of these functions. For example, depending on the permissions corresponding to the user, the user may not be able to view the document flow data, may not be able to download the document, and/or may not use the share functionality. As previously explained, modifications to these permissions may be made as the document is disseminated.

[0141] FIG. **10** depicts a block diagram of a graphical user interface (GUI) **1000** displaying a document flow, according to some embodiments. The document flow displayed may correspond to a document flow data structure. The document flow data structure may track and/or log interactions **1020**, **1030**, **1040** with a document. The information tracked may include user identification information, user credentials, a timestamp corresponding to the interaction and/or a tracking of a modification applied to the document. In some embodiments, the document flow data structure may also track document participants and/or events such as creation, viewing, signing, sharing or downloading. The document flow data structure may also track times, dates, and/or locations like the latitude and longitude of digitally transmitted information. For example, the document flow data structure may track global positioning coordinates related to a document and/or a document interaction event. This may be viewable via GUI **1000**.

[0142] For example, GUI **1000** may track interactions **1020**, **1030**, **1040** where a user has viewed the document, shared the document, and/or modified the document. For example, GUI **1000** may display view interactions **1020**, share interactions **1030**, and/or modification interactions **1040**. In some embodiments, an acknowledgment and/or a signature may be a modification. Viewing GUI **1000**, a user may view the interactions logged in the document flow data structure. GUI **1000** may arrange this information with view buttons **1010A**, **1010B**, **1010C**. Selecting a view button **1010** may allow a user to view the state of the document corresponding to different interactions.

[0143] In some embodiments, GUI **1000** may present interactions **1020**, **1030**, **1040** in a timeline view to track the sequence of modifications. In some embodiments, GUI **1000** may categorize interactions **1020**, **1030**, **1040** by type. In some embodiments, a user may sort and/or filter the interactions corresponding to the document.

[0144] FIG. **11A** depicts a block diagram of a graphical user interface (GUI) **1100A** displaying documents corresponding to a user, according to some embodiments. In some embodiments, GUI **1100A** may be displayed when a home button is selected on a menu bar.

[0145] GUI **1100A** may display documents as tiles with each tile corresponding to a different document. A tile may include a menu button **1110**, a header portion **1120**, and/or a status portion **1130**. The header portion **1120** may include information related to the document. For example, the header portion **1120** may include a document title, a date of creation and/or last update, and/or a document type. The document type may, for example, indicate whether the document is a contract document. The status portion **1130** may provide status information and/or other information related to users interacting with the document. For example, the status information may indicate whether a document has been acknowledged or signed. The status portion **1130** may also indicate a document

owner based on a user name and/or other identification information. In some embodiments, status portion **1130** may also display users that have interacted with the document. For example, status portion **1130** may display profile pictures depicting the users that have interacted with the document.

[0146] In some embodiments, each tile may include a menu button **1110**. Menu button **1110** may be similar to menu button **910**. Selecting menu button **1110** may provide similar functionality when viewing documents as tiles. As described with reference to FIG. **11B**, selecting a menu button **1110** may display a menu corresponding to the particular document corresponding to the selected menu button **1110**.

[0147] FIG. **11B** depicts a block diagram of a graphical user interface (GUI) **1100B** displaying a menu overlaying the documents corresponding to the user, according to some embodiments. The menu displayed may correspond to a menu button **1110** selected for a particular document. Similar to the menu described with reference to FIG. **9B**, the menu presented in GUI **1100B** may include a timeline button **1140**, a download button **1150**, and/or a share button **1160**. As previously described with reference to FIG. **10**, selecting the timeline button **1140** may present a document flow to view the logged transactions corresponding to the document. Selecting download button **1150** may allow the user to download a local copy of the document to the corresponding user device **140**. Selecting share button **1160** may allow a user to identify users to receive the document and/or the document link. In some embodiments, this sharing may occur via an address book corresponding to the user account. In some embodiments, selecting the share button **1160** may generate a document link that the user may send using another message.

[0148] In some embodiments, one or more of these options may be unavailable depending on the permissions provided for a user. For example, a document owner may have permission to use each of these functions. A downstream user, however, may not be allowed to use each of these functions. For example, depending on the permissions corresponding to the user, the user may not be able to view the document flow data, may not be able to download the document, and/or may not use the share functionality. As previously explained, modifications to these permissions may be made as the document is disseminated.

[0149] FIG. **12** depicts a block diagram of a graphical user interface (GUI) **1200** for sharing a document to different users, according to some embodiments. In some embodiments, GUI **1200** may be accessed when selecting a share button corresponding to a document. GUI **1200** may be used to identify users to receive a document and/or a document link. GUI **1200** may be populated with user profiles **1220**, **1230**, **1240**, **1250**, **1260**. User profiles **1220**, **1230**, **1240**, **1250**, **1260** may include a name and/or a role corresponding to a user. One or more of the user profiles **1220**, **1230**, **1240**, **1250**, **1260** may be selected to receive the document and/or the document link.

[0150] GUI **1200** may include an addition button **1210**. Selecting addition button **1210** may allow a user to find and/or add another user to a corresponding address book. Selecting addition button **1210** may generate GUI **1300** as further described with reference to FIG. **13**.

[0151] FIG. **13** depicts a block diagram of a graphical user interface (GUI) **1300** for adding a new user for sharing a document, according to some embodiments. GUI **1300** may include an address field **1310**, phone number field **1320**, role field **1330**, and/or a message field **1340**. In the address field **1310**, a user may specify an address, such as an email address or social media identification to deliver the message and/or the document link. In some embodiments, a user may deliver the message and/or the document link via a text message to a mobile device. In this case, the user may include a phone number in phone number field **1320**. In some embodiments, phone number field **1320** may include a drop down menu allowing for specification of a country corresponding to the phone number.

[0152] GUI **1300** may include role field **1330**. Role field **1330** may allow a user to specify a role for the user accessing the document. In some embodiments, the role may designate the permissions corresponding to document interactions. For example, an acknowledger role may limit interactions

with the document to viewing and/or acknowledging receipt of the document. In some embodiments, role field **1330** may be a drop down menu allowing a user to specify a role for the recipient of the document and/or document link. GUI **1300** may also include message field **1340**. Message field **1340** may allow the user to add a message to the recipient receiving the document and/or document link. Message field **1340** may also be used to transmit the message. A user receiving the message and/or the document link may access the document in the manner described above.

[0153] FIG. **14** depicts a block diagram of a graphical user interface (GUI) **1400** with a graphical document link **1430**, according to some embodiments. GUI **1400** may be used by a user who has provided a document **1410** to document linking system **110**. For example, a user may view GUI **1400** using a user device **140**. GUI **1400** may display document **1410**, link generation object **1420**, and/or a graphical document link **1430**. Using GUI **1410**, the user may provide commands to document linking system **110** to generate graphical document link **1430**.

[0154] Graphical document link **1430** may operate similar to the document link previously described. Graphical document link **1430** may be a two-dimensional image that may be used to link a recipient to document **1410**. In some embodiments, graphical document link **1430** may be a two-dimensional bar code. For example, graphical document link **1430** may be a QR code. To generate graphical document link **1430**, a user may interact with link generation object **1420**. Link generation object **1420** may be GUI object with one or more parameters that the user may set to generate graphical document link **1430**. For example, link generation object **1420** may allow a user to set whether the document is private or public. As further explained below, this designation may affect the response of document linking system **110** when a user attempts to access document **1410** via graphical document link **1430**. In some embodiments, link generation object **1420** may include a serial number and/or link corresponding to graphical document link **1430**. For example, link generation object **1420** may list a URL corresponding to link generation object **1420**.

[0155] Once a user has submitted document **1410**, document linking system **110** may generate graphical document link **1430** for the user to disseminate. Document linking system **110** may generate graphical document link **1430** in a manner similar to those described with reference to FIG. **2** and FIG. **3A**. Upon generating graphical document link **1430**, document linking system **110** may provide graphical document link **1430** to the user via user device **140**. In some embodiments, graphical document link **1430** may be an image that the user may disseminate. For example, a user device **140A** may receive graphical document link **1430** from document linking system **110**. In some embodiments, this may occur via document delivery system **130A**. In some embodiments, user device **140A** may receive graphical document link **1430** directly from document linking system **110** using GUI **1400**.

[0156] After receiving graphical document link **1430**, user device **140A** may then transmit the graphical document link **1430** to user device **140B** to disseminate the graphical document link **1430**. For example, user device **140A** may disseminate graphical document link **1430** in a similar manner as those described with reference to disseminating a document link. In some embodiments, this may occur via document delivery system **130A** and/or **130B**. In some embodiments, user device **140A** may post graphical document link **1430** to a website and/or create a social media post including graphical document link **1430**. In some embodiments, user device **140A** may print graphical document link **1430** onto a physical medium such as paper or a poster.

[0157] After disseminating graphical document link **1430**, a second user may attempt to access document **1410** using graphical document link **1430**. In some embodiments, the second user may use user device **140B** to scan graphical document link **1430**. For example, user device **140B** may scan graphical document link **1430** using a camera. This scan may extract a URL corresponding to document **1410** and/or document linking system **110**. In some embodiments, scanning graphical document link **1430** may generate GUI **800** as described with reference to FIG. **8**. Document linking system **110** may then request credentials from the second user. In some embodiments, this

may occur when the document **1410** is designated as private. Upon supplying the credentials, document linking system **110** may determine whether the user is permitted to access document **1410**. If document **1410** has been designated as public, the user may still be prompted to supply credentials after scanning graphical document link **1430**. For either the private or public designation, these credentials may be tracked in a document flow data structure as previously described. After supplying acceptable credentials, document linking system **110** may reveal document **1410** similar to the manner described with reference to FIG. **9A**.

[0158] Upon viewing document **1410**, the user may interact with document **1410** in a similar manner to those described above. These interactions may correspond to permission designations. For example, some users may be permitted to view document **1410** while others may be permitted to modify document **1410**. In some embodiments, this modification may be applying a signature or acknowledging receipt of the document. Document linking system **110** may track interactions with document **1410** in a document flow data structure. Similar to the document flow data structure described above, this document flow data structure may track document participants and/or events such as creation, viewing, signing, sharing or downloading. The document flow data structure may also track times, dates, and/or locations like the latitude and longitude of digitally transmitted information. For example, the document flow data structure may track global positioning coordinates related to a document and/or a document interaction event. Document linking system **110** may generate a GUI displaying the data from the document flow data structure to the owner of document **1410**. The owner may then adjust document access as described above.

[0159] Using graphical document link **1430**, a user may disseminate and/or track interactions with a document in a user friendly and streamlined manner. In some embodiments, a realtor or seller may create document **1410**. Document **1410** may include property information. Document **1410** may include additional attachments. These attachments may be embedded in document **1410** and/or may be linked in document **1410**. Document linking system **110** may provide an attachment to a user if a link is selected. In some embodiments, the attachment may be an owner's disclosure report, property survey, appraisal, and/or other types of documents. The realtor or seller may then generate graphical document link **1430** using document linking system **110**. The realtor or seller may then disseminate graphical document link **1430** to potential buyers. This may be via digital messages and/or via printing the graphical document link **1430** onto a physical medium. For example, the realtor or seller may promote document **1410** via social media, For Sale signs, MLS listings, marketing brochures and materials, and/or other digital or physical media. Interested parties, consumers, and/or buyers may then scan graphical document link **1430** to quickly access document **1410**. In some embodiments, when graphical document link **1430** is a QR code, the scan may be a QR scan. Upon scanning graphical document link **1430**, the interested party may access information that may not be available on public portals. For example, if document **1410** is a private listing, this private listing may be shared while still being controlled by document linking system **110**. In some embodiments, document linking system **110** may allow for collaboration and/or engagement of the realtor or seller. This may help to facilitate a knowledge transfer regarding details about the property described in document **1410**. Further, the interested party may also submit an offer using document linking system **110**.

[0160] For the realtor or seller, document linking system **110** may track interactions with document **1410** using the document flow data structure. As previously explained, this document flow data structure may track document participants and/or events such as creation, viewing, signing, sharing or downloading. The document flow data structure may also track times, dates, and/or locations like the latitude and longitude of digitally transmitted information. For example, the document flow data structure may track global positioning coordinates related to a document and/or a document interaction event. This information may help the realtor or seller to track exclusive buyer leads and/or to expand their personal market. This may further help to sell the property described in document **1410** in a faster manner.



[0161] While this example describes document **1410** describing property, document **1410** may also be used to describe off market sales. In some embodiments, document **1410** may also be used for the sale of cars, jewelry, art, and/or other high value assets.

[0162] FIG. **15** depicts a flowchart illustrating a method **1500** for generating a graphical document link, according to some embodiments. Method **1500** shall be described with reference to FIG. **1A** and FIG. **14**; however, method **1500** is not limited to that example embodiment.

[0163] In an embodiment, document linking system **110** may generate graphical document link **1430** as described with reference to FIG. **14**. Document linking system **110** may track downstream access via the graphical document link **1430**. This access may correspond to accessing, viewing, downloading, sharing, acknowledging, signing, editing, and/or modifying document **1410**. While method **1400** is described with reference to document linking system **110**, method **1400** may be executed on any computing device, such as, for example, the computer system described with reference to FIG. **16** and/or processing logic that may comprise hardware (e.g., circuitry, dedicated logic, programmable logic, microcode, etc.), software (e.g., instructions executing on a processing device), or a combination thereof.

[0164] It is to be appreciated that not all steps may be needed to perform the disclosure provided herein. Further, some of the steps may be performed simultaneously, or in a different order than shown in FIG. **15**, as will be understood by a person of ordinary skill in the art.

[0165] At **1505**, document linking system **110** may create a graphical link corresponding to a document generated by a first user account. The graphical link may be graphical document link **1430**. The document may be document **1410**. The first user account may correspond to user device **140A**. Document linking system **110** may generate graphical document link **1430** in a manner similar to that described with reference to FIGS. **1A**, **2**, and **14**. At **1510**, document linking system **110** may transmit the graphical link to a first client device corresponding to the first user account. The first client device may be user device **140A**. This transmission may occur via document delivery system **130A**. In some embodiments, document linking system **110** may populate a message in a messaging application corresponding to document delivery system **130A**. For example, document linking system **110** may embed graphical document link **1430** in a message. In some embodiments, user device **140A** may disseminate graphical document link **1430** to other users as described with reference to FIG. **14**.

[0166] At **1515**, document linking system **110** may receive an access request from a second client device corresponding to a second user account to access the document via a scan of the graphical link. In this case, the second client device may correspond to user device **140B**. The scan may be performed using a camera on user device **140B**. This may be a scan of a physical medium such as a paper or poster. Graphical document link **1430** may have been printed on the paper or poster. Upon scanning the graphical document link **1430**, document linking system **110** may request log-in credentials for the user. These log-in credentials may correspond to document linking system **110**. In some embodiments, the log-in credentials may correspond to document delivery system **130B** servicing user device **140B**. In this manner, if document delivery system **130B** interfaces with document linking system **110**, document delivery system **130B** may provide a single sign on process for user device **140B**.

[0167] At **1520**, document linking system **110** may log the access request with one or more credentials corresponding to the second user account in a document flow data structure. As described with reference to FIG. **1A** and FIG. **14**, the access request may correspond to a permission set by document linking system **110**. For example, if the permission may be set for access requests to correspond to viewing the document, document linking system **110** may identify the access request as a viewing performed by user device **140B**. As previously explained, document linking system **110** may log this viewing in a document flow data structure with credentials corresponding to the user and/or a time stamp corresponding to the interaction. In some embodiments, the access request may correspond to accessing, viewing, downloading, sharing,

acknowledging, signing, editing, and/or modifying the document. In this case, document linking system **110** may log this interaction for the document. The document flow data structure may also track document participants and/or events such as creation, viewing, signing, sharing or downloading. The document flow data structure may also track times, dates, and/or locations like the latitude and longitude of digitally transmitted information. For example, the document flow data structure may track global positioning coordinates related to the access request.

[0168] At **1525**, document linking system **110** may transmit the document to the second client device corresponding to the second user account. Document linking system **110** may transmit the document according to the permissions set by the first user account. The second user account may interact with the document according to the permission. The second user account may also further disseminate the document link to other client devices. In this case, document linking system **110** may receive a request to access the document from other client devices.

[0169] At **1530**, document linking system **110** may generate a graphical user interface (GUI) accessible by the first user account displaying logged data from the document flow data structure. For example, using user device **140A**, the first user account or document owner may view the GUI. An example of this GUI is described with reference to FIG. **10**. Using the GUI, the first user account may set permissions corresponding to document access. As previously explained, these permissions may correspond to the document and/or may be individualized corresponding to each user account. Using this GUI, a document owner may track interactions with the document. These interactions may be different and/or may be timestamped to reflect the interaction. In some embodiments, global positioning locations may also be tracked with these interactions.

[0170] Various embodiments may be implemented, for example, using one or more well-known computer systems, such as computer system **1600** shown in FIG. **16**. One or more computer systems **1600** may be used, for example, to implement any of the embodiments discussed herein, as well as combinations and sub-combinations thereof.

[0171] Computer system **1600** may include one or more processors (also called central processing units, or CPUs), such as a processor **1604**. Processor **1604** may be connected to a communication infrastructure or bus **1606**.

[0172] Computer system **1600** may also include user input/output device(s) **1603**, such as monitors, keyboards, pointing devices, etc., which may communicate with communication infrastructure **1606** through user input/output interface(s) **1602**.

[0173] One or more of processors **1604** may be a graphics processing unit (GPU). In an embodiment, a GPU may be a processor that is a specialized electronic circuit designed to process mathematically intensive applications. The GPU may have a parallel structure that is efficient for parallel processing of large blocks of data, such as mathematically intensive data common to computer graphics applications, images, videos, etc.

[0174] Computer system **1600** may also include a main or primary memory **1608**, such as random access memory (RAM). Main memory **1608** may include one or more levels of cache. Main memory **1608** may have stored therein control logic (i.e., computer software) and/or data.

[0175] Computer system **1600** may also include one or more secondary storage devices or memory **1610**. Secondary memory **1610** may include, for example, a hard disk drive **1612** and/or a removable storage device or drive **1614**. Removable storage drive **1614** may be a floppy disk drive, a magnetic tape drive, a compact disk drive, an optical storage device, tape backup device, and/or any other storage device/drive.

[0176] Removable storage drive **1614** may interact with a removable storage unit **1618**. Removable storage unit **1618** may include a computer usable or readable storage device having stored thereon computer software (control logic) and/or data. Removable storage unit **1618** may be a floppy disk, magnetic tape, compact disk, DVD, optical storage disk, and/or any other computer data storage device. Removable storage drive **1614** may read from and/or write to removable storage unit **1618**.

[0177] Secondary memory **1610** may include other means, devices, components, instrumentalities

or other approaches for allowing computer programs and/or other instructions and/or data to be accessed by computer system **1600**. Such means, devices, components, instrumentalities or other approaches may include, for example, a removable storage unit **1622** and an interface **1620**. Examples of the removable storage unit **1622** and the interface **1620** may include a program cartridge and cartridge interface (such as that found in video game devices), a removable memory chip (such as an EPROM or PROM) and associated socket, a memory stick and USB port, a memory card and associated memory card slot, and/or any other removable storage unit and associated interface.

[0178] Computer system **1600** may further include a communication or network interface **1624**. Communication interface **1624** may enable computer system **1600** to communicate and interact with any combination of external devices, external networks, external entities, etc. (individually and collectively referenced by reference number **1628**). For example, communication interface **1624** may allow computer system **1600** to communicate with external or remote devices **1628** over communications path **1626**, which may be wired and/or wireless (or a combination thereof), and which may include any combination of LANs, WANs, the Internet, etc. Control logic and/or data may be transmitted to and from computer system **1600** via communication path **1626**.

[0179] Computer system **1600** may also be any of a personal digital assistant (PDA), desktop workstation, laptop or notebook computer, netbook, tablet, smart phone, smart watch or other wearable, appliance, part of the Internet-of-Things, and/or embedded system, to name a few non-limiting examples, or any combination thereof.

[0180] Computer system **1600** may be a client or server, accessing or hosting any applications and/or data through any delivery paradigm, including but not limited to remote or distributed cloud computing solutions; local or on-premises software (“on-premise” cloud-based solutions); “as a service” models (e.g., content as a service (CaaS), digital content as a service (DCaaS), software as a service (SaaS), managed software as a service (MSaaS), platform as a service (PaaS), desktop as a service (DaaS), framework as a service (FaaS), backend as a service (BaaS), mobile backend as a service (MBaaS), infrastructure as a service (IaaS), etc.); and/or a hybrid model including any combination of the foregoing examples or other services or delivery paradigms.

[0181] Any applicable data structures, file formats, and schemas in computer system **1600** may be derived from standards including but not limited to JavaScript Object Notation (JSON), Extensible Markup Language (XML), Yet Another Markup Language (YAML), Extensible Hypertext Markup Language (XHTML), Wireless Markup Language (WML), MessagePack, XML User Interface Language (XUL), or any other functionally similar representations alone or in combination. Alternatively, proprietary data structures, formats or schemas may be used, either exclusively or in combination with known or open standards.

[0182] In some embodiments, a tangible, non-transitory apparatus or article of manufacture comprising a tangible, non-transitory computer useable or readable medium having control logic (software) stored thereon may also be referred to herein as a computer program product or program storage device. This includes, but is not limited to, computer system **1600**, main memory **1608**, secondary memory **1610**, and removable storage units **1618** and **1622**, as well as tangible articles of manufacture embodying any combination of the foregoing. Such control logic, when executed by one or more data processing devices (such as computer system **1600**), may cause such data processing devices to operate as described herein.

[0183] Based on the teachings contained in this disclosure, it will be apparent to persons skilled in the relevant art(s) how to make and use embodiments of this disclosure using data processing devices, computer systems and/or computer architectures other than that shown in FIG. **16**. In particular, embodiments can operate with software, hardware, and/or operating system implementations other than those described herein.

[0184] It is to be appreciated that the Detailed Description section, and not any other section, is intended to be used to interpret the claims. Other sections can set forth one or more but not all

exemplary embodiments as contemplated by the inventor(s), and thus, are not intended to limit this disclosure or the appended claims in any way.

[0185] While this disclosure describes exemplary embodiments for exemplary fields and applications, it should be understood that the disclosure is not limited thereto. Other embodiments and modifications thereto are possible, and are within the scope and spirit of this disclosure. For example, and without limiting the generality of this paragraph, embodiments are not limited to the software, hardware, firmware, and/or entities illustrated in the figures and/or described herein. Further, embodiments (whether or not explicitly described herein) have significant utility to fields and applications beyond the examples described herein.

[0186] Embodiments have been described herein with the aid of functional building blocks illustrating the implementation of specified functions and relationships thereof. The boundaries of these functional building blocks have been arbitrarily defined herein for the convenience of the description. Alternate boundaries can be defined as long as the specified functions and relationships (or equivalents thereof) are appropriately performed. Also, alternative embodiments can perform functional blocks, steps, operations, methods, etc. using orderings different than those described herein.

[0187] References herein to “one embodiment,” “an embodiment,” “an example embodiment,” or similar phrases, indicate that the embodiment described can include a particular feature, structure, or characteristic, but every embodiment can not necessarily include the particular feature, structure, or characteristic. Moreover, such phrases are not necessarily referring to the same embodiment. Further, when a particular feature, structure, or characteristic is described in connection with an embodiment, it would be within the knowledge of persons skilled in the relevant art(s) to incorporate such feature, structure, or characteristic into other embodiments whether or not explicitly mentioned or described herein. Additionally, some embodiments can be described using the expression “coupled” and “connected” along with their derivatives. These terms are not necessarily intended as synonyms for each other. For example, some embodiments can be described using the terms “connected” and/or “coupled” to indicate that two or more elements are in direct physical or electrical contact with each other. The term “coupled,” however, can also mean that two or more elements are not in direct contact with each other, but yet still co-operate or interact with each other.

[0188] The breadth and scope of this disclosure should not be limited by any of the above-described exemplary embodiments, but should be defined only in accordance with the following claims and their equivalents.

## Claims

1. A computer implemented method, comprising: receiving, at a document linking system, a document creation request via a user selection of a graphical user interface (GUI) object integrated into an application managed by a document delivery system, wherein the document linking system has provided instructions to the document delivery system to generate the GUI object; receiving, at the document linking system, a document; creating, at the document linking system, a link corresponding to the document; and transmitting, from the document linking system to the document delivery system, the link to populate a message in the application, wherein accessing the link provides access to the document.
2. The computer implemented method of claim 1, further comprising: receiving, at the document linking system, a request to access the document via a user selection of the link, wherein the request is associated with a user account; and logging, at the document linking system, the request with one or more credentials corresponding to the user account in a document flow data structure tracking interactions with the document.
3. The computer implemented method of claim 2, wherein the one or more credentials are provided

to the document linking system by the document delivery system.

**4.** The computer implemented method of claim 2, further comprising: logging with the request one or more location coordinates corresponding to a location of a client device corresponding to the user account.

**5.** The computer implemented method of claim 1, further comprising: receiving, at the document linking system, a first request to access the document via a first user selection of the link, wherein the first request is associated with a first user account that received the message from the application; logging, at the document linking system, the first request with one or more credentials corresponding to the first user account in a document flow data structure tracking interactions with the document; receiving, at the document linking system, a second request to access the document via a second user selection of the link, wherein the second request is associated with a second user account that received the link from the first user account; and logging, at the document linking system, the second request with one or more credentials corresponding to the second user account in the document flow data structure.

**6.** The computer implemented method of claim 5, further comprising: receiving, at the document linking system, a designation of a permission restriction for the document for the second user account; modifying, at the document linking system, the document flow data structure to associate the permission restriction with the one or more credentials corresponding to the second user account; receiving, at the document linking system, a third request to access the document via selection of the link by the second user account; and transmitting, from the document linking system, the document to the second user account while restricting functionality based on the permission restriction designated in the document flow data structure.

**7.** The computer implemented method of claim 1, further comprising: receiving, at the document linking system, a request to access the document via a user selection of the link, wherein the request is associated with a user account; transmitting, from the document linking system, the document to a client device corresponding to the user account; receiving, at the document linking system, a modification of a portion of the document; and logging, at the document linking system, the modification with one or more credentials corresponding to the user account in a document flow data structure tracking interactions with the document.

**8.** The computer implemented method of claim 7, further comprising: creating, at the document linking system, a second document token corresponding to the modification; and updating, at the document linking system, an association for the link such that accessing the link corresponds to an access request for the modification.

**9.** The computer implemented method of claim 7, wherein the modification includes a signature applied to the document or an acknowledgement of receiving the document.

**10.** A document linking system, comprising: a memory; and at least one processor coupled to the memory and configured to: receive a document creation request via a user selection of a graphical user interface (GUI) object integrated into an application managed by a document delivery system, wherein the at least one processor has provided instructions to the document delivery system to generate the GUI object; receive a document; create a link corresponding to the document; and transmit, to the document delivery system, the link to populate a message in the application, wherein accessing the link provides access to the document.

**11.** The document linking system of claim 10, wherein the at least one processor is further configured to: receive a request to access the document via a user selection of the link, wherein the request is associated with a user account; and log the request with one or more credentials corresponding to the user account in a document flow data structure tracking interactions with the document.

**12.** The document linking system of claim 11, wherein the one or more credentials are provided to the document linking system by the document delivery system.

**13.** The document linking system of claim 10, wherein the at least one processor is further

configured to: receive a first request to access the document via a first user selection of the link, wherein the first request is associated with a first user account that received the message from the application; log the first request with one or more credentials corresponding to the first user account in a document flow data structure tracking interactions with the document; receive a second request to access the document via a second user selection of the link, wherein the second request is associated with a second user account that received the link from the first user account; and log the second request with one or more credentials corresponding to the second user account in the document flow data structure.

**14.** The document linking system of claim 13, wherein the at least one processor is further configured to: generate a graphical user interface displaying the interactions with the document from the document flow data structure.

**15.** The document linking system of claim 13, wherein the at least one processor is further configured to: receive a designation of a permission restriction for the document for the second user account; modify the document flow data structure to associate the permission restriction with the one or more credentials corresponding to the second user account; receive a third request to access the document via selection of the link by the second user account; and transmit the document to the second user account while restricting functionality based on the permission restriction designated in the document flow data structure.

**16.** The document linking system of claim 10, wherein the at least one processor is further configured to: receive a request to access the document via a user selection of the link, wherein the request is associated with a user account; transmit the document to a client device corresponding to the user account; receive a modification of a portion of the document; and log the modification with one or more credentials corresponding to the user account in a document flow data structure tracking interactions with the document.

**17.** The document linking system of claim 16, wherein the at least one processor is further configured to: create a second document token corresponding to the modification; and update an association for the link such that accessing the link corresponds to an access request for the modification;

**18.** The document linking system of claim 16, wherein the modification includes a signature applied to the document or an acknowledgement of receiving the document.

**19.** A non-transitory computer-readable device having instructions stored thereon that, when executed by at least one computing device, cause the at least one computing device to perform operations comprising: receiving, at a document linking system, a document creation request via a user selection of a graphical user interface (GUI) object integrated into an application managed by a document delivery system, wherein the document linking system has provided instructions to the document delivery system to generate the GUI object; receiving, at the document linking system, a document; creating, at the document linking system, a link corresponding to the document; and transmitting, from the document linking system to the document delivery system, the link to populate a message in the application, wherein accessing the link provides access to the document.

**20.** The non-transitory computer-readable device of claim 19, the operations further comprising: receiving, at the document linking system, a first request to access the document via a first user selection of the link, wherein the first request is associated with a first user account that received the message from the application; logging, at the document linking system, the first request with one or more credentials corresponding to the first user account in a document flow data structure tracking interactions with the document; receiving, at the document linking system, a second request to access the document via a second user selection of the link, wherein the second request is associated with a second user account that received the link from the first user account; and logging, at the document linking system, the second request with one or more credentials corresponding to the second user account in the document flow data structure.

**21.** A computer implemented method, comprising: receiving, at a document linking system from a

first user device, a document creation request via a user selection of a graphical user interface (GUI) object generated by the document linking system; receiving, at the document linking system, a document from the user device; creating, at the document linking system, a graphical link corresponding to the document; transmitting, from the document linking system, the graphical link to the first user device; receiving, at the document linking system, an access request from a second client device via a scan of the graphical link using a camera on the second client device; logging, at the document linking system, the access request with one or more credentials corresponding to the second client device; and transmitting, at the document linking system, the document to the second client device.

**22.** The computer implemented method of claim 21, wherein the graphical link is a two dimensional image.

**23.** The computer implemented method of claim 21, wherein the graphical link is a QR code.

**24.** The computer implemented method of claim 21, wherein the logging further comprising: logging with the access request one or more location coordinates corresponding to a location of the second client device.

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