

# **WhiteDoc documentation**

**version**

**WhiteDoc**

August 26, 2020



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# Welcome to WhiteDoc's documentation!

## Registration personal/company accounts

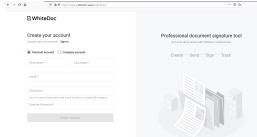
To be able to use WhiteDoc, you must register and create an account:

- Registration personal account.
- Registration company account.

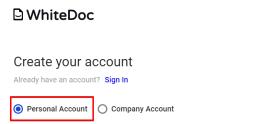
Follow this link to register personal or company account: <https://staging.whitedoc.space/registration>

### Personal account registration

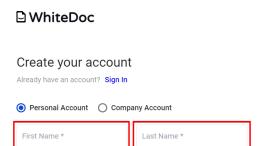
1. Navigate to <https://staging.whitedoc.space/registration>



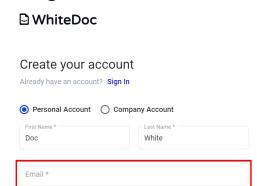
2. Select personal account checkbox if this checkbox not selected.



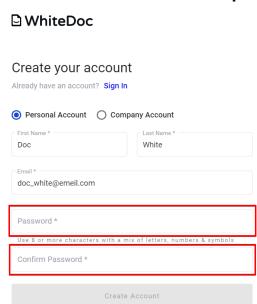
3. Fill in name and last name fields.



4. Fill in "Email" field, this email will be use for login.



5. Fill in "Password" field and repeat fill in password in "Confirm password" field.



6. After filled all required fields button "Create Account" stay active and clickable. Click on the button for continue registration.

Create your account  
Already have an account? [Sign In](#)

Personal Account  Company Account

First Name \* Doc Last Name \* White

Email \* docwhite@email.com

Password \*   
Re-type Password \*

[Create Account](#)

7. After you click on "Create account" button will be send validation letter on address which you point on 4 step and you will redirect to confirmation page.

Confirm your e-mail address  
Keep your account secure

Confirmation code   
Required field

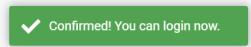
[Re-send](#)

[Back to register](#) [Next](#)

8. For finish registration you should confirm your email address. For that go to mailbox which you use for registration, in this mailbox open letter from WhiteDoc. Letter contains confirmation link and confirmation code. For finish registration you should use one of them.



- For finish registration by confirmation link you should click on link in email and after that you will be redirect to: <https://staging.whitedoc.space/login> and in the upper right corner will appear message about success registration.
- For finish registration by confirmation code, you should copy code from letter and return to confirmation page. Input code in confirmation field and click next. If you input correct code you will observe same message about success registration.

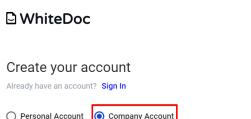


## Company account registration

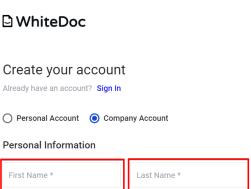
1. Navigate to <https://staging.whitedoc.space/registration>.



2. Select company account checkbox if this checkbox not selected.



3. Fill in name and last name fields.



4. Fill in "Email" field which will be use for registration process. You will get validation letter on this email.

# Welcome to WhiteDoc's documentation!

**WhiteDoc**

Create your account  
Already have an account? [Sign In](#)

Personal Account  Company Account

Personal Information

First Name *	Last Name *
Doc	White
Email *	
doc_white@email.com	

5. Fill in “Password” field and repeat fill in your password in field “Confirm password”

**WhiteDoc**

Create your account  
Already have an account? [Sign In](#)

Personal Account  Company Account

Personal Information

First Name *	Last Name *
Doc	White
Email *	
doc_white@email.com	
Password *	
Use 8 or more characters with a mix of letters, numbers & symbols	
Confirm Password *	

6. Fill in Company name field.

**WhiteDoc**

Create your account  
Already have an account? [Sign In](#)

Personal Account  Company Account

Personal Information

First Name *	Last Name *
Doc	White
Email *	
doc_white@email.com	
Password *	
Use 8 or more characters with a mix of letters, numbers & symbols	
Confirm Password *	

Company Details

Company Name
WhiteDoc

7. Fill in ITN field.

**WhiteDoc**

Create your account  
Already have an account? [Sign In](#)

Personal Account  Company Account

Personal Information

First Name *	Last Name *
Doc	White
Email *	
doc_white@email.com	
Password *	
Use 8 or more characters with a mix of letters, numbers & symbols	
Confirm Password *	

Company Details

WhiteDoc
Individual taxpayer number

6. For continue registration you should click on “Continue” button, this button will enable after you filled all required fields.

## Login

The screenshot shows the 'Create your account' form. It includes fields for First Name (Doc), Last Name (White), Email (doc.white@email.com), Password, and Confirm Password. Below this is the 'Company Details' section with fields for Company Name (WhiteDoc) and Individual Taxpayer number (12345678). A red box highlights the 'Continue' button at the bottom.

7. After click on “Continue” button you will redirect to page where you can add mailboxes to your account. Account should has at least one mailbox. To add mailbox click on “Plus” button.

The screenshot shows the 'Define your mailboxes' page. It displays a single mailbox entry 'WhiteDoc1' with a plus sign button to its right. Below the entries are 'Back to register' and 'Complete' buttons. A red box highlights the 'Complete' button.

8. After you defined count of mailboxes and their names, click on “Complete” button.

The screenshot shows the 'Define your mailboxes' page again, this time with two entries: 'WhiteDoc1' and 'WhiteDoc2'. Below the entries are 'Back to register' and 'Complete' buttons. A red box highlights the 'Complete' button.

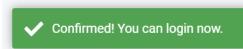
9. After you click on “Complete” button validation letter will be send on your email address which you point on step 4 and you will redirect to confirmation page.

The screenshot shows the 'Confirm your e-mail address' page. It has a 'Confirmation code' field with a placeholder 'Confirmation code' and a 'Re-send' button. Below the field are 'Back to register' and 'Next' buttons. A red box highlights the 'Next' button.

10. For finish registration you should confirm your email address. For that go to mailbox which you use for registration,in this mailbox open letter from WhiteDoc. Letter contains confirmation link and confirmation code. For finish registration you should use one of them.



- For finish registration by confirmation link you should click on link in email and after that you will be redirect to: <https://staging.whitedoc.space/login> and in the upper right corner will appear message about success registration.
- For finish registration by confirmation code, you should copy code from letter and return to confirmation page. Input code in confirmation field and click next. If you input correct code you will observe same message about success registration.



## Login

fdhskfhsdklfjksdljfl;dsfsd

# Mailboxes

## Content:

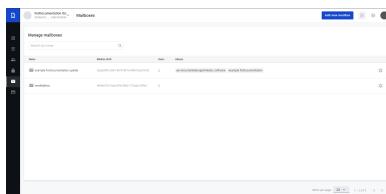
<b>Mailboxes</b>	<b>5</b>
Add new mailbox	5
Check users assigned to mailbox	6
Edit mailbox	6
Edit mailbox name	6
Copy mailbox UUID	7
Add/Remove alias(es) for mailbox	7
Danger zone	7
Unassign users from mailbox	8
Delete mailbox	8
Delete mailbox behaviour	8
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Mailboxes page it's a part of admin panel interface. This page allows:

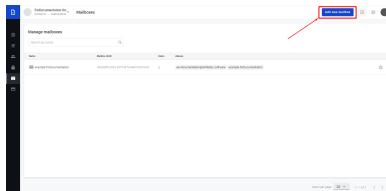
1. Manage current mailbox(es);
2. Create new mailbox(es);
3. Remove user(s) from mailbox(es);
4. Delete mailbox(es);

To open mailboxes page navigate to <https://staging.whitedoc.space/admin/mailboxes>

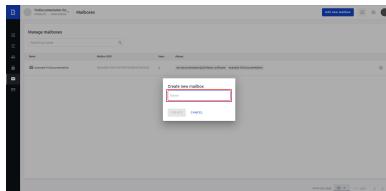


## Add new mailbox

1. Click on the button "Add new mailbox"

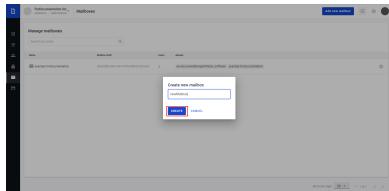


2. Modal window of the mailbox creation opens. Enter a name of the mailbox

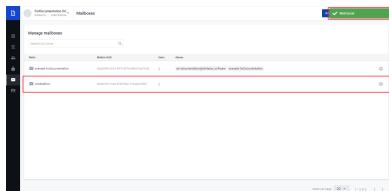


## Mailboxes

3. Click on the button “Create” (the state of the “Create” button will change after name enters)



4. After successful mailbox creation will show message in the right corner of the page and mailbox will show in the list of mailboxes



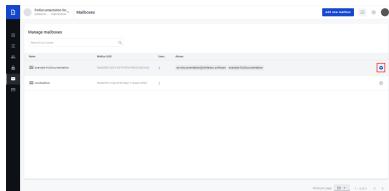
### Check users assigned to mailbox

To check the users which assigned to the particular mailbox click on the link with number in the column “Users”. After this action redirect will happen to the page Users <https://staging.whitedoc.space/admin/users> with perdefined filter by Mailbox.

### Edit mailbox

Edition interface allows update name of the mailbox, add and remove aliases of the mailbox, copy the mailboxes UUID, unassign all users who has permissions to the mailbox and delete mailbox.

To open edition form of the mailbox, just click on the settings icon

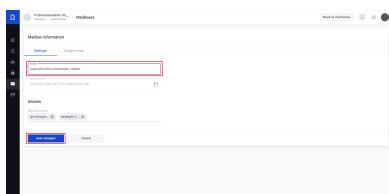


### Edit mailbox name

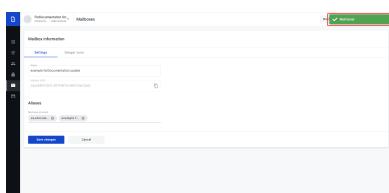
Name field has length validation:

1. Min value - 1 symbol
2. Max value - 255 symbols

To edit name just focus the name, change the name and click on “Save changes” button

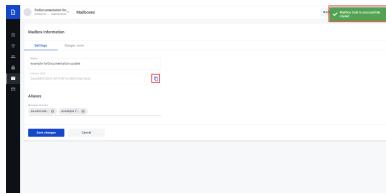


After successful edition of the mailbox the notification message will show at the right corner of the page



## **Copy mailbox UUID**

To copy the mailbox UUID click on the copying icon. After successful copying the notification message will be shown at the right corner of the page.

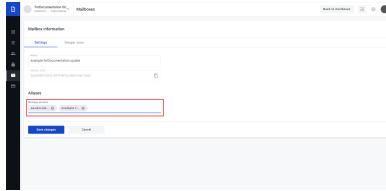


## **Add/Remove alias(es) for mailbox**

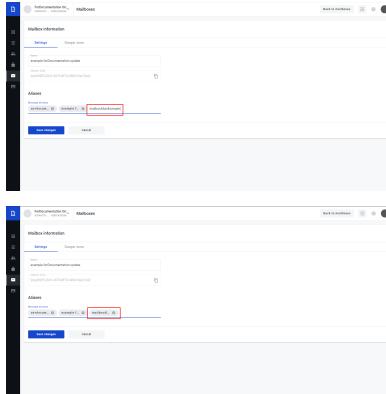
For the particular mailbox aliases couldn't be duplicated only unique values accepts.

To add alias(es) to the mailbox

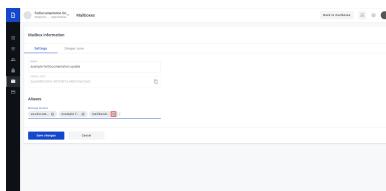
1. Click on the aliases area of the page



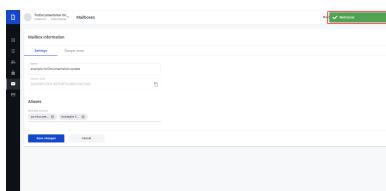
2. Enter the alias and press "Enter", "." or "," button on keyboard to add alias to the list, after that click on "Save changes" button



To remove alias(es) from the mailbox, click on remove icon of the alias and click on "Save changes" button

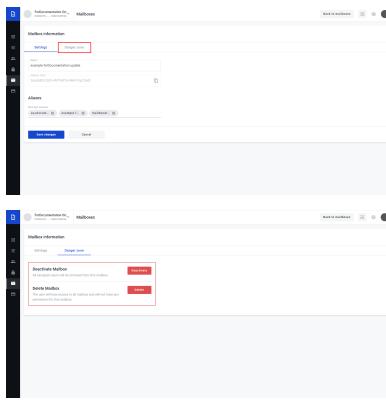


After successful edition of the mailbox the notification message will show at the right corner of the page



## **Danger zone**

To unassign all users from mailbox or delete mailbox switch to "Danger Zone" tab by click on "Danger Zone" heading



## Unassign users from mailbox

1. To unassign all users from mailbox (remove all permissions to the particular mailbox from the all users who has it except the user who do the action) click on the button “Deactivate”
2. Confirm the decision and users will be unassigned

## Delete mailbox

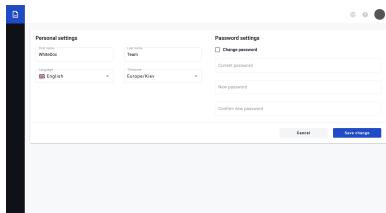
1. To delete mailbox click on “Delete” button
2. Enter the mailbox in upper case to the field in the modal window which opens after click on “Delete” button
3. Confirm the decision and mailbox will be deleted

### Warning

Please note! Behaviour of mailbox after deletion

## Delete mailbox behaviour

1. Deleted mailbox can't be restored.
2. Mailbox is disappearing from mailbox list at admin panel on mailbox page.
3. If user try to use deleted mailbox - he receive 410 error and will be redirected to first mailbox to which he has access. If user hasn't have access to any mailboxes he will be redirected to profile and all application will be blocked except profile and admin page(if he has access to any account).



## Admin panel

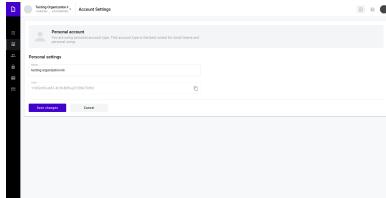
### Admin Settings

Account Settings - is a list of account properties that helps to identify and manage account. Data from account used for creating mailboxes and billing.

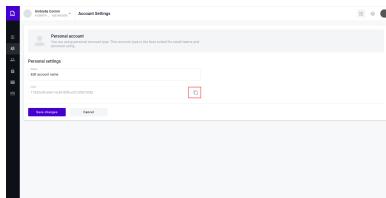
### Copy Account uuid

## Admin panel

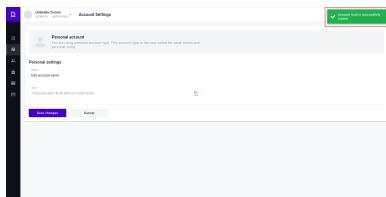
1. Navigate to <https://staging.whitedoc.space/admin/account-settings>



2. Click "copy" icon"

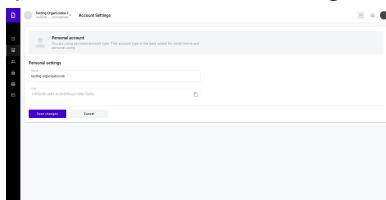


3. Message about successful copy should appear

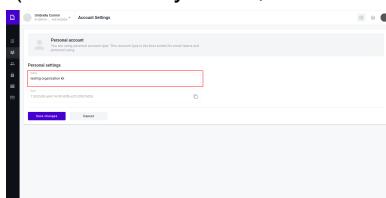


## Edit personal account

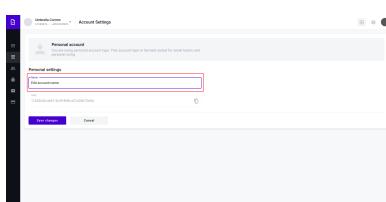
1. Navigate to <https://staging.whitedoc.space/admin/account-settings>



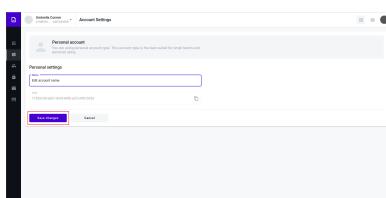
2. Click on the "Name" input. Validation (minimum 3 symbols, maximum 256 symbols)



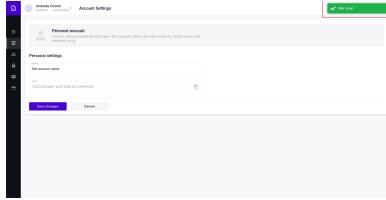
3. Edit account name.



4. Press save changes

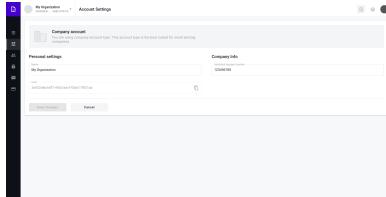


4. Message about successful update should appear

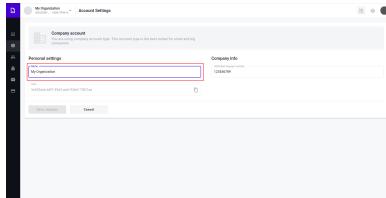


## Edit company account

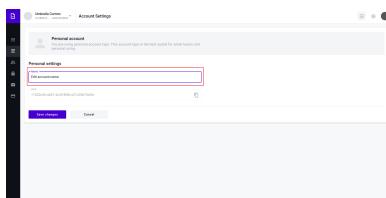
1. Navigate to <https://staging.whitedoc.space/admin/account-settings>



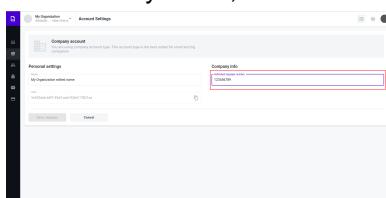
2. Click on the "Name" input. Validation (minimum 3 symbols, maximum 255 symbols)



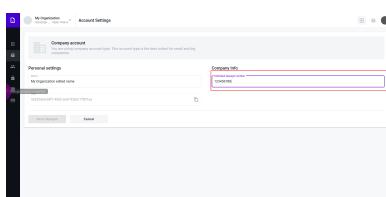
3. Edit account name.



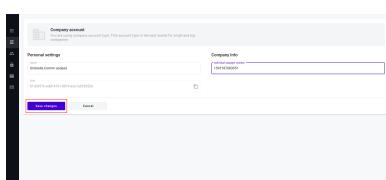
4. Click on the "ITN" input. Validation (minimum 8 symbols, maximum 128 symbols)



5. Edit account itn.

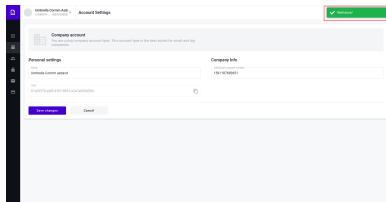


6. Press save changes



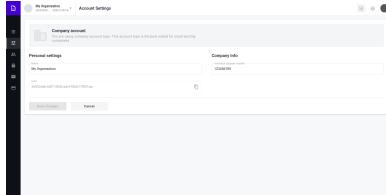
7. Message about successful update should appear

## Admin panel

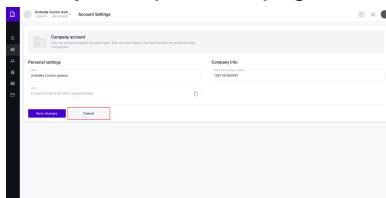


## Going back

1. Navigate to <https://staging.whitedoc.space/admin/account-settings>

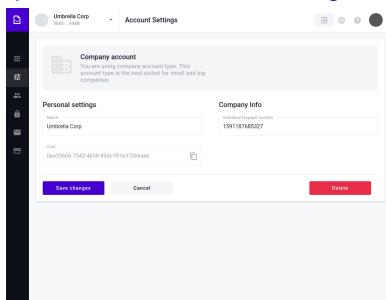


2. Click "Cancel" button. This action will take you to previous page.

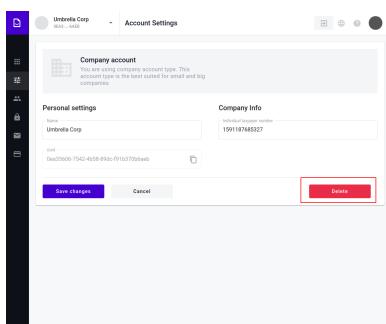


## Delete account

1. Navigate to <https://staging.whitedoc.space/admin/account-settings>

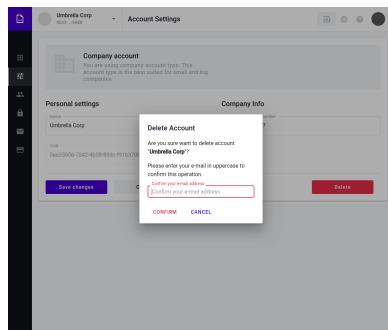


2. Click "Delete" button.

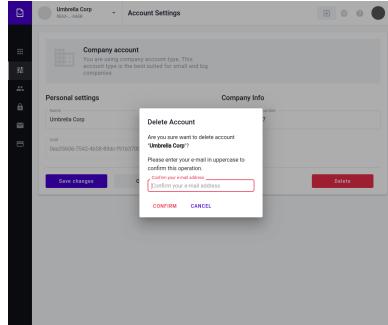


3. Popup should open.

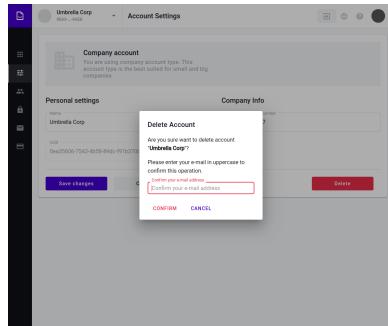
## Admin panel



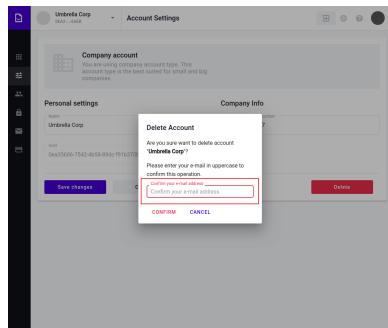
4. Popup should open.



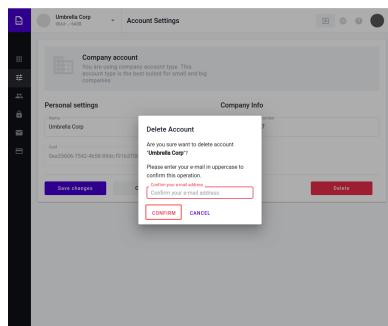
5. If you want to cancel the operation click 'Cancel'



6. Type your user e-mail in uppercase to email input



7. Click "Confirm"



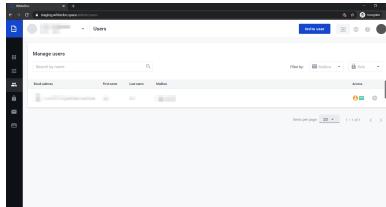
## Users

### Invite users to Account/Mailbox by email

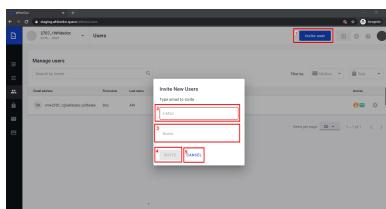
Registered user can invite in Account/Mailbox any users if he has necessary permissions . If user accept your invite he will get special permissions which you provide him when send invite. By email you're able to invite registered users and users who has not already registered at the whitedoc.

To invite new users in your Account/Mailboxes follow by next steps:

1. Navigate to <https://staging.whitedoc.space/admin/users>.



2. Click on (1)Invite user button.

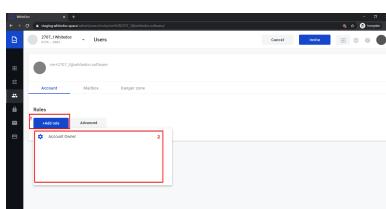


3. After that will shown modal window with two fields for fill. (2)Email field and (3)Name field. (2)Email field is required and on email which you input on this field will be send invitation letter. (3)Name field is optional.

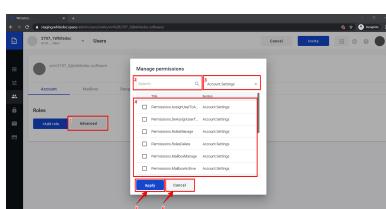
4. If you filled necessary field (2)email and optional filled field (3)name, click on (4)Invite button(Button (4)Invite will be unavailable before you fill in field (2)), after that you will be redirected to user edition page at the account tab where you can select permissions which you want to provide for this user. On this page you can select permissions for user to account and user to mailboxes.

#### Add permission to account

Select role with permissions from (2)roles list. To add role click on (1)+Add role button. You're able to choose a couple of roles to one user. For you will be available system roles by default. If you want you can create custom roles and these roles will be available here.

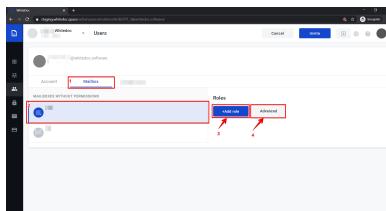


Select specific permissions from (4)permissions list. To select specific permissions click on (1)Advanced button. After that modal window will be opened, there are (2)search field, (3)filters, (4)permissions list and control button (5)Apply, (6)Cancel. For select necessary permission you should select checkbox near permissions. When you select all account permission which you want provide for invited user click on (5)Apply button or if you change your mind click on (6)Cancel button.



#### Add permissions to mailbox:

For select permission to mailbox need go to (1)mailbox tab. On this tab presented mailboxes which related to this account.



To add permissions to mailbox you can in the same way as to account. The main difference is we have to choose a mailbox to which permissions will be added.

5. If you have defined all permission which you want to provide to user click on Invite button in the header. If invite has created successfully at the top right corner of the page notification message will be shown, and invitation letter will be sent to the email which has been provided. The process of the invitation will be evolved in two directions, depending on whether we are inviting new or existing user.

### **Warning**

Behaviour of invite internal user

### **Warning**

Behaviour of invite external user

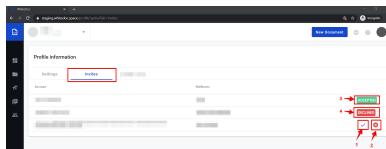
## **Behaviour of invite external user**

After invitation creation the user who has not registered yet will get the email with the link to the registration form. If user follows this link he/she will be redirected to the registration form with prefilled email address and name (if name set up at the invitation form), where email is not editable. As soon as user fill required field at the registration page and confirm registration he will create user profile, account and mailbox(es) and also get permissions according to the permissions which has been set at the invitation step.

## **Behaviour of invite internal user**

After you create invite, user who already registered will get email with link to invites tab on user profile.

In invites tab he can observe all invites and accept or decline these invites. For accept invites click on (1)Accept button. After that on this row will be shown message (3)Accepted For decline click on (2)Decline button. After that on this row will be shown message (4)Declined



After user accepted or declined your invitation you will get notification email with user decision.

**Roles****Mailboxes****Fields****Dictionary****Content:**

<b>Dictionary</b>	<b>15</b>
Dictionary template field	15
Dictionary envelope field	15
Dictionary	28

---

Dictionary - is a list of records in a systematic form, e.g. list of employee(Name, Surname, Age, Address). Data from dictionary could be used in envelope:

1. Create dictionary field in template.
2. Set dictionary and column from which recipient will select data to field.

**Dictionary template field**

To add dictionary field to template drag and drop dictionary field from the fields bar to the document. Select dictionary, receiver role and column of the dictionary. Also it's possible to set "Allow custom value" it allows to enter custom value on envelope stage (when receiver fill in the document).

**Dictionary envelope field**

User need to select value from the list of records values. If allow custom value attribute is true - user can enter custom value. After value was set to field and processing flow was continued - value of dictionary field is blocked. Any updates in dictionary doesn't apply to this field.

**Lookup Field**

Lookup field automatically pull value from field dictionary field from record. Lookup field available only when template has one or more dictionaries without allow custom value attribute.

# Content:

<b>Lookup Field</b>	<b>15</b>
Create Lookup Field	16
Edit Lookup Field	16
Lookup Field Template	16
Lookup Inside Table-field	16
Missing Column At Lookup Field	17
No Access To Dictionary	17
Disabled Lookup Field	17
Deleting Dictionary Field	17
Lookup Field Envelope	17

## Create Lookup Field

1. Navigate to <https://staging.whitedoc.space/template/form/editor>
2. Drag and drop lookup-field to the document
3. Form should appear
4. Fill the name of the field (Should be unique per document)
5. Fill the placeholder for this field (Not mandatory, if you won't fill this field, name will be used as placeholder).
6. Choose document from list of documents with dictionaries without allow custom value attribute.
7. Choose to with dictionary field lookup field will be applied by setting related to attribute.
8. Choose which column (from dictionary column) should use lookup field to set value.
9. Click save.
10. Field added

## Edit Lookup Field

1. Navigate to <https://staging.whitedoc.space/template/form/editor>
2. Click on the lookup field in the document
3. Edit field form should appear on the right side
4. Click on "Delete" button will delete field and close edit form
5. Click on Cancel will close edit form
6. You can change parameters the same way as described in "Create Lookup Field"
7. Click on "Save" will Save all the changes you mad and close edit form

## Lookup Field Template

Lookup field at document can use dictionary field from any document in template if they are not inside table-field.

## Lookup Inside Table-field

Lookup field inside table field can use only dictionary field from this table or dictionary field from any document in template. Lookup field inside table can't use dictionary from other table-field.

## Missing Column At Lookup Field

When lookup field use dictionary column that was deleted - he became invalid and template became invalid too. To fix lookup field need to select new column.

## No Access To Dictionary

When dictionary field has no access to dictionary template became invalid and field became invalid and lookup field that was related to this dictionary field became invalid too. To fix lookup field need to select new dictionary at dictionary field to which lookup was attached and set new column at every lookup field that was related to this dictionary field.

## Disabled Lookup Field

Lookup field is disabled when template hasn't have any dictionary field.

## Deleting Dictionary Field

Deleting dictionary field isn't available when dictionary has lookup field that is related to him. Need to delete lookup field or set them related to other dictionary field first.

## Lookup Field Envelope

Lookup field disabled on envelope. For fill in lookup field need select dictionary value, when dictionary value selected all lookup fields which related to this dictionary field will be automatically fill. User can't fill in lookup fields if he don't have access to dictionary which used in dictionary field. User can fill in all lookup fields on envelope and save this envelope as a draft and send later. If somebody change dictionary(update records, delete column or delete dictionary) before user send envelope draft with lookup fields, user will observe error message with information about dictionary changes. If dictionary was deleted all lookup fields which related to this dictionary field will be highlighted by red color.

## Sign Field

Sign field is a field that allows user to sign our documents online.

## Create Sign Field

1. Navigate to <https://staging.whitedoc.space/template/form/editor>

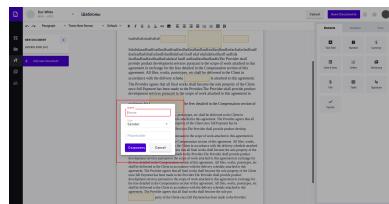


2. Drag and drop sign-field to the document

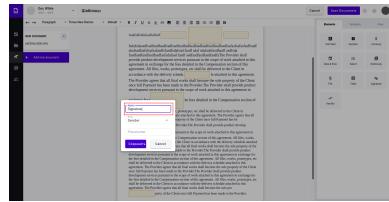


3. Form should appear

## Fields



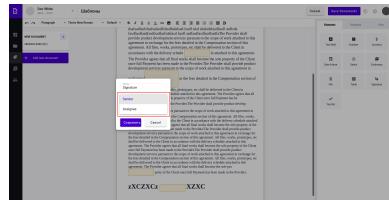
4. Fill the name of the field (Should be unique per document)



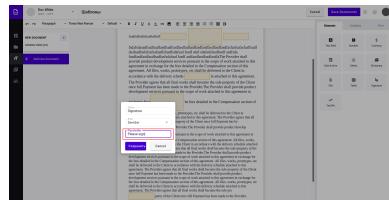
5. Choose Role to fill this field by clicking on "Role" input (default role is Sender)



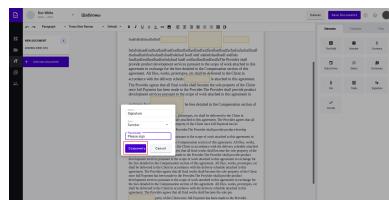
5. Choose Role to from the list by clickin on role name



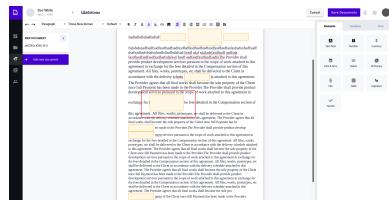
6. Fill the placeholder for this field (Not mandatory, if you won't fill this field, name will be used as placeholder)



7. Click save



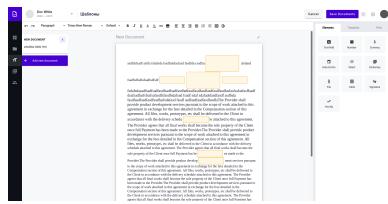
8. Field added



## Cancel Sign Field

1. Navigate to <https://staging.whitedoc.space/template/form/editor>

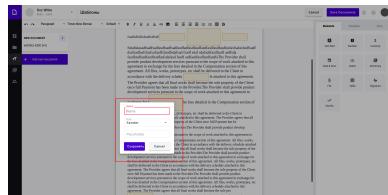
## Fields



2. Drag and drop sign-field to the document



3. Form should appear



4. Click "Cancel" button. Field won't be added



## Edit Sign Field

1. Navigate to <https://staging.whitedoc.space/template/form/editor>



2. Click on the sign field in the document

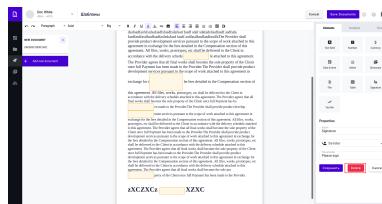


3. Edit field form should appear on the right side



4. Click on "Delete" button will delete field and close edit form

## Fields



5. Click on Cancel will close edit form



6. You can change parameters the same way as described in "Create Sign Field"



7. Click on "Save" will Save all the changes you mad and close edit form

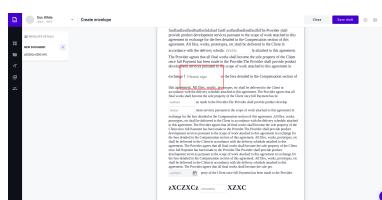


## Fill Sign Field

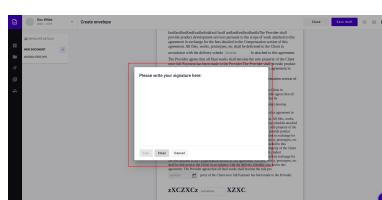
1. Navigate to <https://staging.whitedoc.space/envelope/create/:uuid> (where uuid is uuid of your template with signature field)



2. Click on signature field

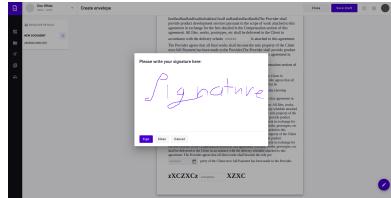


2. Popup must open

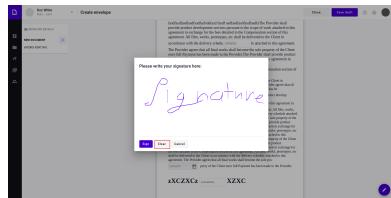


## Fields

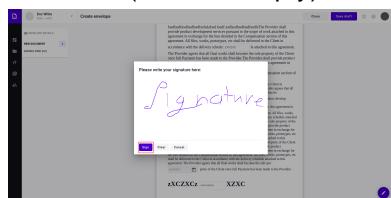
3. Draw your signature on the empty area by pressing left side on the mouse and dragging it around. You have to draw at least 0.5 sec to complete validation of the field



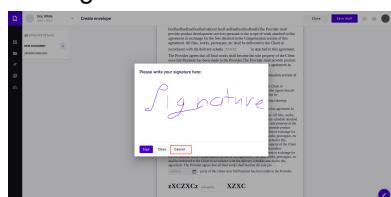
4. Click on "Clear" button to reset draw area



5. Click "Sign" to insert your signature to the field (can't be empty)



6. Click "Cancel" to close popup without changes



7. After clicking "Save" you will see your signature in the document



8. You can't edit signature you can only replace it by clicking on the picture of your signature and repeating steps 2, 3 and 5

## Table Field

Table field allows to customer to add dynamic data (such as text, numeric, currency, date and time, e-ink signature, dictionary and lookup fields.) to the document. Also allows to prepare table exactly of the size which needed for participant of the envelope processing flow (currently restricted by 5 columns and doesn't restricted by rows quantity).

# Content:

<b>Table Field</b>	<b>21</b>
Create Table Field	22
Fill Table with fields	22
Edit Table Field properties	22
Edit Table field content	22
Fill table field as owner	23

## Create Table Field

1. Navigate to <https://staging.whitedoc.space/template/form/editor>.
2. Drag and drop lookup-field to the document.
3. Form should appear.
4. Fill the name of the field (Should be unique per document).
5. Select the owner of the table.
6. Fill the quantity of the columns of the table (max quantity 5 columns).
7. Click save.
8. Field added.

## Fill Table with fields

1. Add table to the document.
2. Drag and drop field (which you needed) to the table cell (which you needed), set and save field properties. To add to the table possible only: text, numeric, currency, date and time, e-ink signature, dictionary and lookup fields. Add table inside the table impossible.

## Edit Table Field properties

1. Navigate to <https://staging.whitedoc.space/template/form/editor>.
2. Click on the table field in the document.
3. Edit field form should appear on the right side.
4. Click on “Delete” button will delete field and close edit form.
5. Click on Cancel will close edit form.
6. You can change name of the field and role to whom table assigned.
7. Click on “Save” will Save all the changes you mad and close edit form.

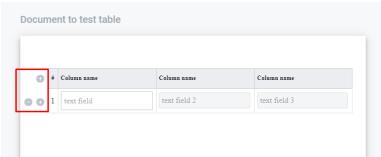
## Edit Table field content

1. Add table to the document.
2. Click on the header of the particular column and type the name different from “Column name”.
3. Name of the column has been updated.
4. At the header you’re able to add or remove column of the table using “+” and “-” buttons (max quantity of the table columns 5), if you press “-” of the last column table will be removed.

Recently used templates on dashboard

### **Fill table field as owner**

Only owner of the table has management buttons to add or remove rows “+” and “-” which located at the left side of the table field.



Each added row would be added with fields and fields properties which has been added at the template.



As soon as table owner added table rows and fill all neccessary data to the document he is able to send the document according to the flow. As an owner of the table could be one of the participants of the processing flow.

Currently validation of the processing flow and table relation does not present.

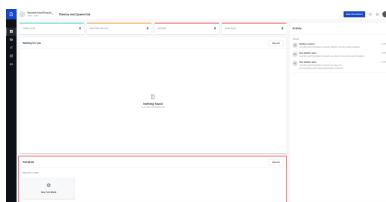
The rest of the participants is able just to fill the fields inside the table with required data.

## **Recently used templates on dashboard**

### **Content:**

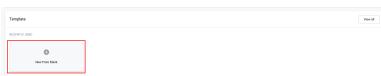
<b>Recently used templates on dashboard</b>	23
Open template creation form from dashboard	23
Open template list page from dashboard	23
Recently used templates displaying on dashboard	24

Recently used templates block allows to user create new template from dashboard, see the list of the last fourth recently used templates, open edition form of the particular recently used template and open templates list form from dashboard page.



### **Open template creation form from dashboard**

Click on “New From Blank”



User will be redirected to template creation page <https://staging.whitedoc.space/template/form/create>

### **Open template list page from dashboard**

Click on “View all”

## User profile



User will be redirected to template creation page <https://staging.whitedoc.space/template/list?s=mailbox>

### Recently used templates displaying on dashboard

1. If user use template at least one time the template will be displayed at the recently used templates form on dashboard
2. If user click on recently used template it will open particular template for edition
3. Maximum quantity of the templates at this particular form is 4 templates



4. If user creates new envelope using new template and he has already had 4 templates at recently used the oldest one will disappear and new one will be shown to the user



## User profile

### Contents:

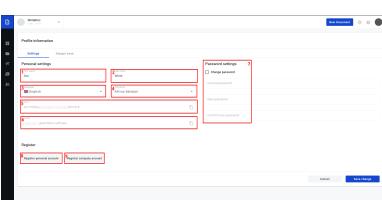
<b>User profile</b>	<b>24</b>
Edit profile settings	25
Register personal account	26
Register company account	26
Delete user profile	26

**User profile** page allows:

1. Update profile settings.
2. Register personal accounts.
3. Register company accounts.
4. Delete profile.

To open user profile page navigate to <https://staging.whitedoc.space/profile>.

On **Settings** tab you can edit (1) First name/(2) Last name, (3) change language, (4) change timezone, (7) change password, start process for (8)register personal account, start process for (9)register company account. Fields (5) Profile UUID, (6) e-Mail not editable.



On **Danger zone** tab you can start process for (1) delete user profile.



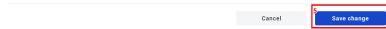
## Edit profile settings

1. To start edit (1) First name/(2) Last name, just focus on necessary field which you want to edit, make changes in this field and click on “Save change” button.

The screenshot shows the 'Profile Information' section with 'Personal settings'. Fields for 'First name' and 'Last name' are highlighted with red boxes. A 'Save change' button is visible at the bottom right.

2. To change password need select checkbox(1) otherwise fields (2), (3), (4) will be unavailable. After checkbox (1) selected input current password in field (2), new password input in field(3) for confirm new password repeat input new password in field (3). If all input data correct button (5)Save change will be available and you can confirm change password to click on this button.

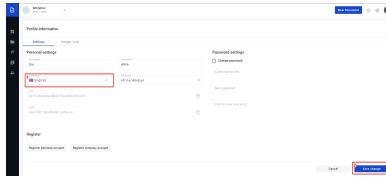
The screenshot shows the 'Password settings' section with the 'Change password' checkbox checked. Fields for 'Current password', 'New password', and 'Confirm new password' are highlighted with red boxes.



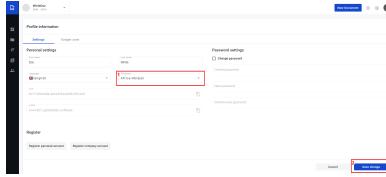
If password successfully changed the notification message will show at the right corner of the page.



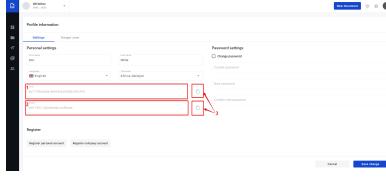
3. To change language click on field (1)Language, after that will be open drop down menu where you can select language which supported our system. For confirm this changes click on (2)Save change button.



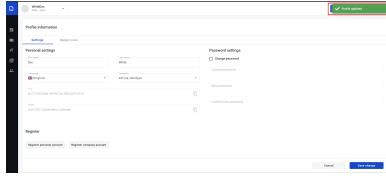
4. To change timezone click on field (1)Timezone, after that will be open drop down menu where you can select interested you timezone. For confirm this changes click on (2)Save change button.



5. To copy the (1)Profile UUID or (2)e-Mail click on button (3)Copy.

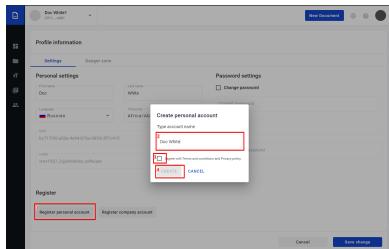


If profile successfully edited the notification message will show at the right corner of the page.

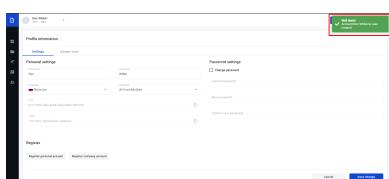


## Register personal account

1. To register new personal account click on (1)Register personal account button.
2. Modal window of the personal account creation opens. Enter a name of the Account in field(2).
3. Select checkbox (3)"I agree with Terms and conditions and Privacy policy"
4. Click on the button (4)"Create" (the state of the "Create" button will change after name enters and selected checkbox).

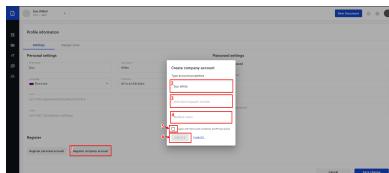


5. After successful account creation, also created mailbox for this account with same name and in the right corner of the page will show message.

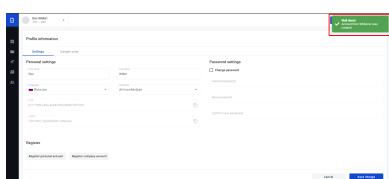


## Register company account

1. To register new company account click on (1)Register company account button.
2. Modal window of the personal account creation opens. Enter a name of the Account in field(2).
3. Enter Individual taxpayer number in field (3).
4. Enter a name of the mailbox in field (4).
5. Select checkbox (5)"I agree with Terms and conditions and Privacy policy"
6. Click on the button (6)"Create" (the state of the "Create" button will change after name enters and selected checkbox).



5. After successful account creation, also created mailbox for this account with same name and in the right corner of the page will show message.



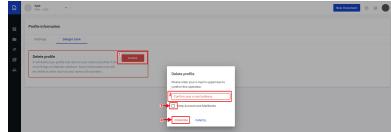
## Delete user profile

To delete user profile go to Danger zone tab. User deletion profile process has two flow.

1. After User profile deletion will be deleted all Accounts where user has role "Account owner" and all data which related to these accounts.

## User profile

2. User can keep all Accounts and all data which related to these accounts after User profile deletion.

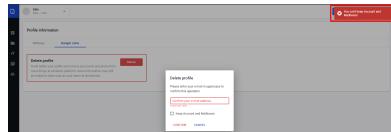


### Delete User profile, Accounts and all related data

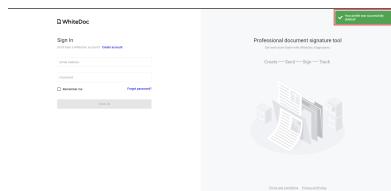
1. Click on (1)Delete button
2. Enter the e-Mail in upper case to the field (2) in the modal window which opens after click on “Delete” button.
3. Click on button (4)Confirm for confirm decision to delete user profile, Accounts and Mailboxes.
4. After deletion user profile you will be logout and redirected to login page.

### Delete User profile, keep Accounts and all related data

1. Before delete user profile you should assign a new account owner to all accounts where you have this role(Account owner).
2. After that you should go to Danger zone tab in user profile page and click on (1)Delete button.
3. Enter the e-Mail in upper case to the field (2) in the modal window which opens after click on “Delete” button.
4. Select checkbox (3) Keep Account and Mailboxes.
5. Click on button (4)Confirm for confirm decision to delete user profile.
6. If all Accounts where you have role “Account owner” has other owners your profile will be deleted, you will logout and redirected to login page, otherwise you will observe error message in the right corner of the page.



After successful user profile deletion in the right corner of the page will show message. For repair access to our application you should register new user.



### Warning

Please note! Behaviour of data after deleting a user profile

## Dictionary

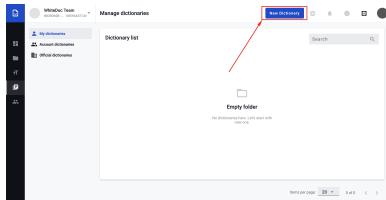
### Content:

<b>Dictionary</b>	<b>15</b>
Dictionary	28
<b>Create Dictionary</b>	<b>28</b>
<b>Editing dictionary</b>	<b>28</b>
<b>Add column</b>	<b>29</b>
<b>Edit column</b>	<b>29</b>
<b>Change column order</b>	<b>29</b>
<b>Delete column</b>	<b>30</b>
<b>Create empty record</b>	<b>30</b>
<b>Edit record</b>	<b>30</b>
<b>Delete record</b>	<b>30</b>
<b>Filtering records</b>	<b>30</b>
<b>Access level</b>	<b>30</b>
<b>Edit dictionary name/description</b>	<b>31</b>
<b>Delete dictionary</b>	<b>31</b>
<b>Behaviour of dictionary field after deleting a dictionary column or a dictionary</b>	<b>31</b>

Dictionary - is a list of records in a systematic form, e.g. list of employee(Name, Surname, Age, Address).

### Create Dictionary

1. Navigate to <https://staging.whitedoc.space/dictionary>
2. Click to create dictionary button.



### Editing dictionary

Dictionary editing is available only to mailbox that are owner of this dictionary. When user doesn't have permissions to do some operation - functionality is blocked.

#### Permissions:

**Dictionary manage** - allow to create new dictionary, add column, change column order, edit columns, change name, description, access level of dictionary;

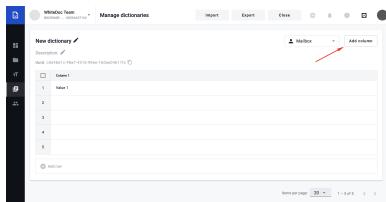
**Dictionary delete** - allow to delete dictionary;

**Dictionary row manage** - allow to create records and change value in records;

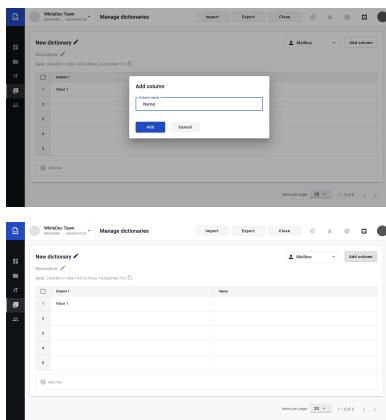
**Dictionary row delete** - allow to delete records.

### Add column

1. Add column to dictionary.

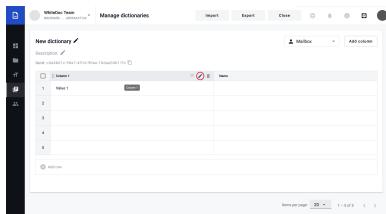


2. Enter a column name. Columns can have the same names. Maximum length of the column name is 64 characters.

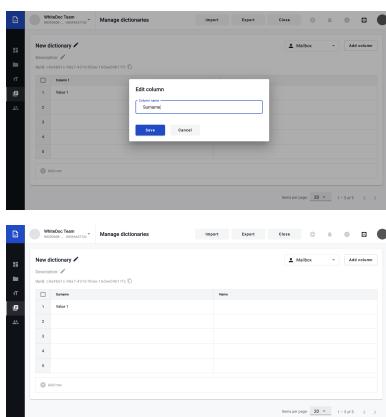


### Edit column

1. Click to edit icon on column name. Icon appear when user point to column name.



2. Enter new column name.



### Change column order

1. Drag drag'n'drop icon and insert column to new position. Icon appear when user point to column name.
2. Drag column to new position.
3. Columns will be displayed in the same order on template on dictionary field.

## Delete column

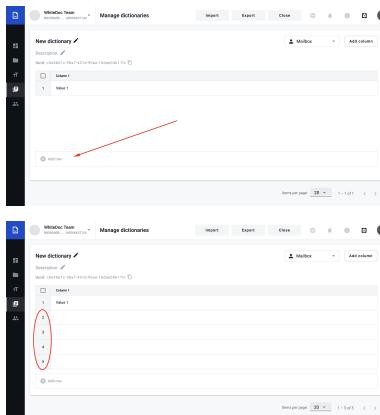
1. Click to delete icon. Icon appear when user point to column name.
2. Confirm that you wanted to delete column.

## Warning

**Please note!** Behaviour of dictionary field after deleting a dictionary column

## Create empty record

1. Create empty record in dictionary. User can create multiple empty records by clicking to the 'Add row' button. Each click - new record.



## Edit record

1. Click to table cell and start entering value to cell. Maximum length of the value is 256 characters.
2. Click checked and value will be applied, also you can click outside and value will be applied too.
3. Click cancel to reject changes and value will not change.

## Delete record

Supports multiple deletion. 1. Set active checkbox or checkboxes in first table column. 2. Click to delete row button. 3. Confirm operation.

## Filtering records

Multiple filters connected by 'OR'. Filter types: Contains, Does not contain, Is equal, Is not equal, Is empty, Is not empty. 1. Click to filter icon. Icon appear when user point to column name. 2. Set filter and enter value. 3. Column name with active filter will have the same color as filter. 4. Filters sort by column order. 5. To cancel filter - click to cancel icon on this filter.

## Access level

Access levels are mailbox, account, public.

**Mailbox** - dictionary is visible only in this mailbox scope. Envelope with dictionary field - records from this dictionary will be available only to this mailbox. Recipient from other mailbox can't select data from this dictionary.

**Account** - dictionary is visible to all mailboxes in this account. Envelope with dictionary field - records from this dictionary will be available to all mailboxes in this account. Recipient from other account can't select data from this dictionary.

## Invitation to the envelope by email

**Public** - dictionary is visible to all mailboxes. Envelope with dictionary field - all mailboxes can use records from this dictionary.

1. Click to select with access levels.
2. Choose new access level.

### **Edit dictionary name/description**

Dictionary name - maximum length is 128 characters.

Dictionary description - maximum length is 256 characters

1. Click to edit icon.
2. Enter value and click check to apply changes or cancel to reject changes.

### **Delete dictionary**

1. Click to delete icon.
2. Confirm operation.

### **Warning**

**Please note!** Behaviour of dictionary field after deleting a dictionary

### **Behaviour of dictionary field after deleting a dictionary column or a dictionary**

#### **Template**

When dictionary or dictionary column are deleted - such template will be invalid(need to select new dictionary or dictionary column in dictionary field at this template).

#### **Envelope**

When dictionary or dictionary column are deleted - dictionary field in processing envelopes will be disabled and envelope with such field will be expired automatically after expiration date, except case when was specified allow custom value attribute. In such case dictionary field will work as text field and user can enter text value to dictionary field, without binding to column values.

## **Invitation to the envelope by email**

### **Content:**

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It's possible to invite participant of the envelope flow by email. Participants which invited by email have to follow the envelope invitation link from email.

Accept invitation to the envelope

## ***Invite participant to envelope by email from the draft page***

- Open draft of the envelope without predefined processing flow and participant there
- To the input of the particular role enter the participant email address (you're able to left the email address and don't choose the mailbox from drop-down list)
- After completeion of the envelope configuration you're able to send envelope
- At the modal window you will see the alert message which says that you try to send envelope to email
- Just confirm and envelope will be send

## ***Invite participant to envelope by email from the template managment page***

- Open template managment page of the particular template
- Open roles edition form
- Set the email to the input and apply changes

## ***States of the envelope with invitation***

Until participant doesn't do any action with invitation envelope stack at the step of the processing flow with particular role. Envelope which has been sent directly to the email could be finished in three cases:

- If participant accept invitation to the envelope processing flow and complete or reject envelope
- If participant doesn't accept invitation than envelope follow to the expired state after expiration date
- If sender or somebody from the processing flow reject the envelope

## ***Participants which could be invited to an envelope***

We're able to invite to an envelope such as customers of the WhiteDoc and non-registered users. The one difference is flow of the envelope invitation acceptance.

- If you leave the email address at the input at the processing flow, participant will be invited by email
- If you select the mailbox from the drop-down list at the processing flow, participant will get envelope as usual

## ***Accept invitation to the envelope***

### **Content:**

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As soon as you get invitation to the envelope to the your email address, you're able to accept invitation. You should follow the link and do three simple steps to complete your part at the envelope processing flow.

## ***Accept envelope as already registered and logged in customer***

Followed the link you will be redirected to the special page where you can accept invitation to envelope. To accept envelope invitation you have to select mailbox which receive the particular envelope. You have different options to accept invitation such as:

## Accept invitation to the envelope

- Select the one of the mailbox from the list
- Create new mailbox
- Register new personal account
- Register new company account

If you select, create mailbox or register account you will be redirected to the particular mailbox with opened envelope. And now you can take a part at the processing flow as a participant.

### **Below provided some restrictions and features of the mailbox selection**

- At the drop-down list of the mailbox selection you will see only mailboxes to which you have access and for which you have permissions to fill and send envelopes
- To create mailbox you will see the modal window with two blocks:
  - Drop-down list with accounts
    - At the drop-down list you will see only accounts to which you have access and for which you have permissions to manage mailboxes
  - Mailbox name
- To register personal account you will see the modal with account name field, checkbox "Terms and conditions acceptance". When you register personal account mailbox creates automatically with name similar to account and envelope will be assigned to this mailbox
- To register company account you will see the modal with three blocks, when you register company account mailbox creates and envelope will be assigned to this mailbox:
  - Account name field
  - ITN number field
  - Mailbox name field
  - checkbox "Terms and conditions acceptance"

### ***Accept envelope as already registered and logged out customer***

Followed the link you will be redirected to the special page where you're able to log in or reset password if you forgot it. Email address will be pre-filled and disabled for edition. After login you will be redirected to special page described above.

The special page for logged out or not register customer contains the general envelope details such as:

- Envelope message
- Mailbox name of the Sender of the envelope
- Expiration date of the envelope

### ***Accept envelope as not registered customer***

Followed the link you will be redirected to the special page where you're able to register personal or company account. After registration personal or company account you redirects to the special page where you should select mailbox, create new one, register personal or company account to accept invitation to the envelope.